What do we have to do to ensure that training helps people learn?

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1. Purpose of the paper - and some preliminary points

Four things worth knowing

- Things
- Oneself
- Other people
- What other people think of us

Schumacher[1]

For more than 15 years now I have led public administration reform projects in a variety of "transition" countries in central Europe and central Asia – in which training and training the trainer activities have always been important elements. Initially I did what most western consultants tend to do – shared "our" good practice. But slowly – because I was no longer living in western Europe – I began to see things from the local perspective. And to realise that my job was to help those I worked with explore different possibilities. I also realised that I needed to make my texts simpler – more graphic – and began to develop tables and diagrams to illustrate points. This paper brings together – and develops - some of those tables and points.

The European Union has spent many hundreds – if not several thousands - of millions of euros on training of public servants in the accession states – and in Eastern Europe and central Asia. Despite the European Commission emphasis on project cycle management and on evaluation, I am aware of no critical evaluation it has commissioned of that spending – nor of any guidelines[2] it has issued to try to encourage good practice.

The paper starts with a stark summary of the situation in one recent member state and then suggest eight questions which should discipline thinking about training -

- WHO needs to learn WHAT?
- WHY (motivation)?
- HOW do people (in public service) learn most effectively?
- From/with WHOM?
- HOW do we know such things?
- How sure are we?

A quick history lesson then intervenes – which invites us to consider who basically benefits from training programmes – the individual trainee? The organisation? The trainer? The training supplier? Section ten then uses that to suggest that effective training systems are those in which these interests are balanced – and explores different ways of achieving this. My feeling is that too much emphasis has been placed by donors on the supply side – on identifying and training people they defined as "trainers", in setting up training institutions. All very necessary - but more attention needs perhaps now to be given to ensuring that the actual staff (and their personnel managers) have the information and mechanisms which would help transform "needs" into something more like "demands"[3].
Sections five and six look at this issue of needs – the most difficult part of the training process but the one which most manuals skip over with platitudes. Section five sets out a framework – and section 6 looks at one recent experience (in local government training) to make a fundamental point. Those who work on technical assistance programmes are encouraged to think in a linear way – first define the needs; then train trainers to be able to satisfy the needs; then organise and deliver the training; and demonstrate to the sponsors by completed questionnaires that the participants had everything has gone according to plan.
I have found myself constantly deviating from this linear model – and use this paper to justify a more "lateral" approach. It argues that our views about "needs" and "learning outcomes" should always be seen as tentative

[1] No - not Michael, the racing driver - but Ernest, the guy who wrote in, 1973, the famous book Small is Beautiful
[2] It has issued, in recent years, guidelines on "good governance", internal project monitoring, project cycle management, institutional assessment and capacity development, ex-ante evaluation
[3] I have to be careful here. "Demand" we are told in economics is "need backed up with money". I do not argue for a pure market approach to training. Simply that we need a better balance between the power of the suppliers and the customers. The UK adult learning credit scheme experience has lessons

– needing to be tested and improved. And that good trainers recognise this – and structure their workshops and inputs accordingly. The paper uses one recent project to illustrate the point – and the process.

The paper then looks at what this means for the sort of trainer we are looking for. T**hose who train trainers** tend to fall into one of two schools –

- Those who focus on the HOW – ie the **dynamics of a training event**; how to make it participative; how to develop "active learning"; how to present etc
- Those who focus on the WHAT - ie **identifying what it is the learner needs to know**

Is it possible to train trainers who can hold both perspectives in balance?

2. Some common faults of training projects in developing administrative capacity

I reproduce below the basic message I left behind in my last project -

- The state system is suffering from "training fatigue". Too many workshops have been held – and most without sufficient preparation or follow-up. Workshops without these features are not worth holding.
- The Training materials, standards and systems developed by projects are hard to find. Too little material is shared and put on websites – let alone properly maintained ones.
- Training is too ad-hoc – and not properly related to the performance of the individual (through the development of core competences) or of the organisation (through, for example, project management)
- A subject specialist is not a trainer.
- It is not enough, however, to operate on the supply side. Standards will rise and training make a contribution to administrative capacity only if there is a stronger demand for more relevant training which makes a measurable impact on individual and organisational performance.
- In the first instance, this will require Human Resource Directors to be more demanding of training managers – to insist on better designed courses and materials; on proper evaluation of courses and trainers; and on the use of better trainers. More realistic guidelines and manuals need to be available for them
- A serious effort needs to be undertaken to establish a network of training suppliers (or community of learners) which can, for example, share experience and materials - and help develop standards.
- It is critical that any training intervention is based on "learning outcomes" developed in a proper dialogue between the 4 separate groups involved in any training system
- HR Directors need to help ensure that senior management of state bodies looks properly at the impact of new legislation on systems, procedures, tasks and skills. Too many people seem to think that better implementation and compliance will be achieved simply by telling local officials what that new legislation says.
- Workshops should not really be used if the purpose is simply knowledge transfer. The very term "workshop" indicates that exercises should be used to ensure that the participant is challenged in his/her thinking. This helps deepen self-awareness and is generally the approach used to develop managerial skills and to create champions of change.
- Workshops have costs – both direct (trainers and materials) and indirect (staff time). There are a range of other tools available to help staff understand new legal obligations.
- Laws do not implement themselves. They require political and managerial commitment and resources.
- Such commitment and resources are in limited supply. Organisations (state bodies) perform only when they are given clear (and limited) goals – and the commensurate resources and management support. This requires the systems and skills of strategic management.
- This can be developed only through senior management being properly encouraged to prioritise and draft realistic action plans – based on project management principles.
- The core mission of Institutes of Public Administration should be to encourage and help senior management acquire these skills
- But they cannot do this as long as they are trapped in traditional teaching philosphies

This may be a tough litany – but I am by no means the first to make such points. In 2003 G Gajduschek and G Hajnal published a highly critical assessment of technical assistance projects in civil service training[4] One of the points they emphasised was that Western consultants imposed models and procedures on these countries which did not fit the local context.
And another report[5] bemoaned the fact that the trainers trained at such expense by the Phare programme to train civil servants had crossed to the private sector and were too expensive now to use in the state sector.

3. The key questions

Training has a purpose. It is carried out to help people learn something. And there are different ways of learning. We need to think very carefully about *who needs to learn*; *what do they need to learn*; and *what can you actually do to help them learn that??* Our target group are **adults** – who have different learning requirements from youngster. Too many organisations assume that training consists of gathering people together and filling them up with facts through lectures.

Basic questions for anyone involved in organise training include the following -

- WHO needs to learn WHAT?
- WHY (motivation)?
- HOW do people (in public service) learn most effectively?
- From/with WHOM?

Table one sets out some of the choices available to us as we pose – and explore – these questions.

Table One. A menu for training

Key Questions	Some Choices
1. WHO needs to learn?	Those assuming new leadership role? Newly-elected Councillors? Specialists needing updated in subjects such as finance etc?
2. WHAT do they need to learn?	Facts? Knowledge? Skills? Behaviour?
3. WHO decides these things? And who should?	Employer? Training supplier? Trainee? Professional association?
4. Using WHAT techniques?	Training audit? Structured interviews (focus groups; attestation committee)? Learning from trial workshops? Others?
5. HOW - and from WHOM - do people learn?	From Colleagues and friends? Their own experience? From books and internet? From discussion? From seeing? From courses?
6. WHERE do they learn?	Classroom? At home? On the job? Mixed?
7. WHO decides this? And who should?	Funder? Provider? Trainer?

[4] Civil Service training Assistance projects in former communist countries - an assessment; (Local Government and Public Services Reform Initiative 2003) Available through the www.unpan.orgbut for some reason not available on the excellent website of the Soros-funded Local Government and Public Service Reform Initiative www.lgi.osi.hu/ directly.
[5] Produced unfortunately by consultants (paid by the EC) and therefore not publicly available!

	Learner? Mixed (negotiation)?

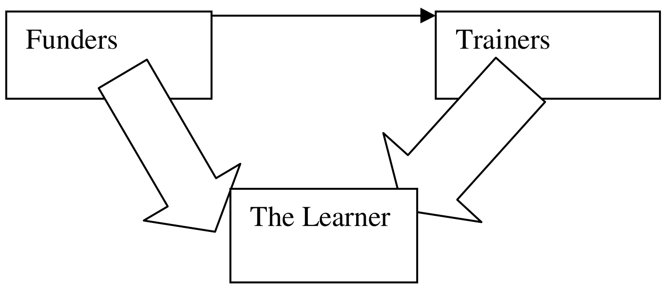
How do we know these things? How sure are we?

4. Training as a power game

4.1 Dominant groups

Management training is quite a mature industry and – for most of its life – the authority of two groups has set the pace (a) **training suppliers** (in which academia was initially dominant) and (b) the **senior managers** who commissioned it. It was these two groups who decided -

- what skills and knowledge were to be developed
- in whom
- who was to provide such courses
- how and where this was done.



As the senior managers usually delegated these issues to the more junior Training or Personnel Manager, most of these questions were decided by the academics **who ran the courses - who were generally subject specialists with no training themselves in training methods**. And in the early years, the focus of training was seen as the more junior staff; the topics **technical** (eg finance) ; the location a **classroom** ; and the method **a lecture**. The "recipients" of the training had little influence on such things: and the effectiveness and credibility of training suffered as a result.

Training is something that always seems to be done to someone else. The verb indeed seems to be parsed "I know: you learn: they are to be trained"!

4.2 Some lessons

Several decades down the line we seem to have "learned", at considerable cost, three big lessons about organisational training strategies

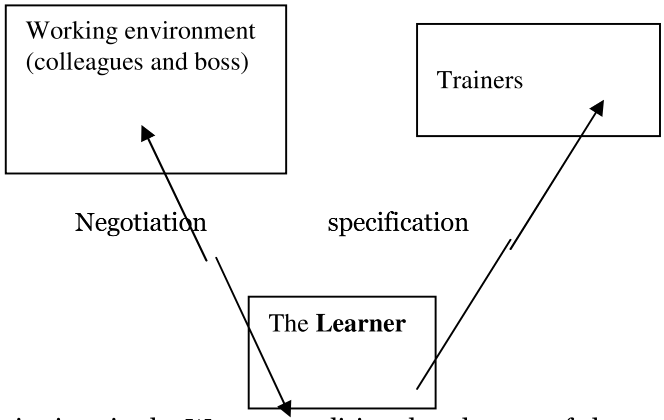
- good and highly appreciated courses can give managers new enthusiasm, perspectives, skills : which, however, are wasted *when they return to an organisation which does not allow the newly acquired skills and attitudes to be applied since it is not willing or able to change*.
- some organisations aware both of the need to change, and of the role of training in that process, find that the courses they have sent managers to have been structured in a *traditional scholastic way which, however unconsciously, teaches conformity and respect for authority* : rather than the inter-personal and strategic skills involved in managing effective change.
- the scale of global change means that *top levels of organisations now have critical - and continuing - learning needs* : only if these are properly addressed will management development elsewhere in the organisation be effective.

In recent years it has been realised that effective learning requires

- the "learner" to feel that (s)he is in control of the process
- to be integrated in and supported by the working environment
- an initial process of helping him/her develop a set of individual learning "targets"
- training suppliers to respond to these.

- in a highly participative way

Formal, scholastically-based training is of limited value unless linked to - and supported by - the working environment. There is little point in someone going on (say) a one-month course unless the individual's immediate manager strongly supports this whether as part of project development or management development - and to the extent of new responsibilities being given on return.



More and more organisations in the West are realising that the sort of change they need to make can only be done by **the whole organisation** engaging in joint learning - led from the top.

4.3 A contradiction?

In transition countries, however, training funders and providers generally share the traditional assumption of their omniscience: and assume that "training" is a fairly routine and self-contained activity concerned to update the information and understanding base of junior staff.
The only "training" in which senior staff might permit themselves to get involved relates to the development of their understanding of EU policies.
Those involved with training programmes for public sector change in transition countries therefore face a challenge so great as almost to be a contradiction - how to help staff develop new values for example of initiative and cooperation when both the power structures which are funding their work and the local trainers who are supplying much of the input embody the old values and traditions?

4.4 Who benefits?

In section ten of this paper I set out the four groups whose proper involvement in a training system determines the value training adds. These are -

- The **client** – who commissions the training in order, one assumes, to achieve specific objectives for the *organisation*
- The **training manager** – who helps define the learning outcomes; ensures the course structure is designed to meet these; selects and briefs the instructors; and gets the participants to the agreed location.
- The **instructor** (trainer) – who prepares and delivers the training material
- The **learners** – who should have some influence over the course structure and their learning process

Who has really benefitted from the vast sums of money spent on training?

- The Individual staff member?
- The Organisation?
- The Trainer?
- The Training organisation?

And how do we make sure that organisations actually improve as a result of training? These are two crucial questions at the heart of this paper.

5. Defining the needs

The textbooks on training tell us to begin with a "training needs assessment" (TNA). But this phrase is actually a bit misleading – since a workshop giving knowledge or skills update may not actually be the real need of the department or the state body. What is very often needed is a refocussing of the organisation's activities – with a concentration on some priorities or new ways of doing things – and a training programme to help ensure that those involved develop a commitment to the change and and an understanding of what it means for them[6].

The first step should, therefore, be to identify what is actually needed –

- skills or knowledge upgrading of specific members of staff who have had their "needs" signalled by some procedure[7]?
- or, on the other hand, a programme of new systems and procedures and skills with consequential training needs for the structure as a whole?

And the answer you get to the questions posed about needs will very often depend on the person you ask.

Many TNAs fail to recognise that there are three different levels of perception, need and "interest" in organisations–

- That of the individual official
- That of his immediate boss
- That of the ultimate source of authority in the organisation – eg the Minister and/or official statements of strategic direction

Box 1 offers one picture of the varying results you could get from needs assessments conducted with different groups of people.

Box 1; How position affects the definition of needs

Ask -	**And he will define the need as -**
The individual	Lack of knowledge
The indivdual's manager	Lack of skills – or appropriate behaviour
The head of the organisation	Need for new procedures

Various mechanisms exist (such as the annual performance review) to try to bring these into line[8].

Table 2 lists the more usual tools – and makes a brief assessment of each. TNA is a phrase which is used, rather loosely, to cover a variety of very different practices – from comprehensive studies of the legal, structural and managerial context in which a state body operates[9], on the one hand, to the informal conversations and text, on the other hand, which justifies a list of training activities.

Table two;TNA Tools – a brief overview

Tool	**Advantages**	**Disadvantages**
1. questionnaires to target group	Precise questions can be posed	Already assumes that a specific group of people need training Respondents may not be aware of (or be willing to indicate) their gaps in knowledge or skills
2. personal development plans	Administratively convenient	Respondents may not be aware of (or be willing to indicate) their gaps in knowledge or skills
3. consultation with persons in key positions, and/or with specific knowledge	Can be done quickly	Misses out the views of those who will receive traiing

[6] The McCourt and Eldridge book listed in the bibliography has an excellent diagram on this.
[7] Eg attestation
[8] for example, the Bulgarian Ministry of Environment has developed a very interesting self-assessment process – ISPA Measure 2002/BG/16/P/PA/003
[9] An example is "Report on admin capacity" (May 2007) accessible at www.envtraining.eu

4. direct observation	More likely to pick up all relevant issues	Takes time – and skills
5. review of job specifications or of new requirements	Can be done quickly and cheaply	As this is a desk exercise, it could miss some key issues
6. individual interviews	Brings neutrality	Respondents unwilling to be open with strangers Takes time – and skills
7. focus groups	Brings neutrality Less costly	Could get "groupthink"
8. workshops used to sharpen preliminary definition	Participants have something tangible to react to and the time to think about their needs	The group may not be representative – or may not wish to offer negative comments

Many of these options require resources or skilled staff which are not available in transition countries. The challenge, therefore, is to develop a clear and easy-to-use framework for state bodies to use at this critical stage of the process. A friend and I have developed a diagram[10] which argues for –

- A stronger interaction between the clients, training managers and trainers in the needs definition; and
- a recognition by all three groups that each workshop is an opportunity to test and improve understanding of both client needs and the performance of trainers.

This doesn't happen of its own accord; it needs authoritative guidelines[11]. And also training managers with the authority to implement them.

6. A Case-Study

This section describes how a team I led tried initially to assess training needs of municipalities – and how we then adjusted our thinking about the way to meet those needs in the light of workshops and the dialogue we had with our "trainers". Section 7 tries to draw out the lessons from the experience.

6.1 The needs assessment

semi-structured interviews and focus group discussions in its two pilot counties with senior representatives of town and village governments, accountants, responsible secretaries, heads of communal service enterprises, and rayon heads and representatives. Almost 100 individuals were interviewed with each interview lasting between one and two hours.
The main four issues around which we structured our discussion were:

- perceived **roles and functions** within the existing systems (political and managerial),
- the working of **local budgets**
- capacity building needs and **training preferences**,
- the role of **IT in** raising effectiveness of the staff and working spaces.

This allowed us to organise 10 workshops in its two pilot counties.

- Some of the workshops focused on towns and had mixed groups (mayors, councillors, senior officials and NGOs)
- Other workshops focused on villages – and consisted of all relevant groups (with separate discussions)

In all cases there was a specific focus eg property management but the structure in all cases was interactive and problem focused – to give participants an opportunity to demonstrate in practical terms the problems

[10] Page 29 of Learning from experience – the role of training in developing administrative capacity in Bulgaria – see key papers folder of my website www.freewebs.com/publicadminreform/
[11] I recently prepared a small manual on assessment methodologies – giving specimen questionnaires. Section 11 of this paper gives an outline.

they experienced in dealing with their responsibilities. And in all cases, we explored in an open way with the groups how they thought the project could assist them in the next 12 months.

What emerged from the initial workshops
The following ideas emerged –

Table 3. What municipal personnel seemed to be asking for

Request for Materials	Request for Workshops	Request for Other assistance
database for funds	How to apply for grants	Help arrange town twinning
How to manage and finance communal property areas – experience of other countries	arrange workshop with councillors from 4 towns on next steps to strengthen municipalities	set up dialogue between, for example, LSA and LSG
Lake protection and access – experience of other countries	"budget implementation"	legal consultations
Corruption	Course on lobbying	Assistance in visiting good practice in other KR municipalities
Local economic development	Property management	Assistance in arranging town twinning
Concept for establishment and development of the regional and local professional LSG centres	Workshop for planning and establishment of centres, training of the centres' trainers.	Regional resource centers (i.e. legislative information)

Legal consultations were needed, we were told, on the following topics:

- Legislation on LSG issues
- Land issues
- Rights and obligations of service providers and consumers
- Housing issues
- Taxes
- Social protections

Councillors requested the following training topics:

- Foreign countries experience in Committees operating
- Budget Implementation
- Mechanisms for submitting legal amendments
- IT trainings
- English languages courses
- Exchange of experience with other municipalities.

The importance of tenant and citizen groups being involved in project work was also emphasised. All this is useful in identifying a range of PRODUCTS for the municipal "market".

Table 4

Type of Product	Example	Present provision
Information and data bases	On funders	Materials on laws
Briefing notes	How to apply for grants	
Case-studies		
Training modules*	Municipal property management Budget transparency	Urban Institute modules Material produced by World-bank funded project
Exchange of experience	Waste management system in one town Data base	

Commentary
People want to learn from seeing and doing. This means presentations about relevant experience from other municipalities – in one's own country. It means getting proper advice on specific problems.

Workshops need to be practical and specially structured – on problems. We were very aware of the useful training material available on the law – and the important technical topics such as local finance and municipal property. We did not want to duplicate that. And, equally, we felt that there was a lack of focus on the key part of the municipality – which is the elected Heads and councillors. That is what makes local government different.

A change of direction
But as we listened to the conversations in our workshops, we realised that lack of clarity in roles was undermining effectiveness (leading to conflict for example between councilors and officials) and that this issue was best tackled at the level of a **single municipality**. This, actually, is how we had started our work in 2005 in both counties – but as it is labour-intensive, we had felt it then necessary to work with specific target groups from a range of municipalities.

It was our local trainers who helped us develop a new approach which went beyond the boundaries of these selected target groups At a workshop in March 2006 they suggested, very reasonably, that they should be part and parcel of the team planning, implementing and evaluating the workshops which our EU visitor (a German mayor) would participate in the following month. That would be the best way to learn about such processes.
We decided to use that visit to test the various assumptions we had been making about target groups, subjects, types of trainers etc.
In the first planning meeting, one of our (new) trainers suggested that the stand-off between the councilors and the executive should be one of the main issues to be explored – and so we opted to run a workshop in her village Although our visitor was already familiar with the country, we arranged that he should spend the first day interviewing various individuals – covering the various roles – elected leadership, officials and citizens.

On the second day, the councilors, officials and citizen activists assembled. Our expert presented his findings. After initial discussion which developed some ideas, the meeting divided into small groups to develop these ideas further. The result was a great success – with a spirit of fatalism changing as the workshop went on to one of enthusiasm. "You have restored hope to us" was the verdict at the end of one of the workshops. And results followed.

6.2 Different ways to learn
As we planned our initial work we were concerned with the elected element in local government – the councillors, the chairmen of committees, the mayors – who were perhaps being ignored with all the emphasis on technical subjects. We felt more emphasis needed to be given to what after all defines local government – these elected people, the skills they need and their accountability to local people. But then the phrase we found ourselves using was "the softer skills" – which are those involved in the roles and relationships which were one of the subjects of the consultancy-type work we started to do in April. The immediate focus of both the prescriptive and organic models is the individual (and their topic needs) - whereas the method we were struggling toward is more holistic. The prescriptive model is formal and disciplined; the organic is more anarchic. These differences are set out in Table 5.

Table 5. Models of learning

	Prescriptive learning	**Organic learning**	**Holistic learning**
Immediate Focus	The individual student	The individual practitioner	The unit or organisation
Style	Hierarchic	Spontaneous	Disciplined but interactive
Example	University	Community development work	Consultancy
Assumption	That missing knowledge is best developed through courses delivered through lectures	That new skills and knowledge is best developed through doing	That people will discover relevant action by structured dialogue
Problem	Attention and memory span	People may not learn from mistakes	Leadership domination may not allow process

We don't want to suggest that the holistic is a superior model – rather we want to suggest that each model is appropriate under certain conditions.

6.3 The notion of core competences

Local government is – or should be – a very different animal from local state administration. But what exactly is the difference? The difference stems basically from the very different accountabilities of the two systems – local government is elected by local citizens and is responsible to them.
The basic task, therefore, of local government is to ensure that community needs are met. Of course, in trying to pursue the needs of the local community, the municipality has to obey the law – but its masters are the local community, not those who happen to form the central government of the day. It does not and should not take instructions from LSA – unless these are backed up by law.

This answer leads to another question – what skills are needed to pursue that basic task?
Clearly the starting point is an understanding of local needs. How is that obtained? Not just by living in the area and asserting you know the local problems!

- It requires **analysis** –since you have to be able to prove to others that what the priorities are. And all this requires skills of observation, listening and argument.
- It requires **decision-making skills** (which is not the individual rationalistic act most textbooks assume!)
- It involves **implementation skills** (which are both people-orientated and technical)

Table 6 sets out the argument in more detail.

Table 6. Core Competences needed in local government leaders

General competence	Example	Skill Requirements
1. Analyse local problems	• Requirement to collect statistics and draft reports • Development of local strategies	analytical problem-solving drafting reports
2. Listen to citizens and report back to them	• complaints • Budget transparency hearings • Annual reports	Political communications
3. Identify and develop new projects	• Building a school • Establishing municipal resource centres (annex 1)	Project management
4. Manage the municipal team	• Recruiting staff; • Weekly team meetings	Basic management
5. Manage resources (money; land; property)	• Managing budgets • Land and property management	Professional skills of classification, measurement and valuation
6. manage services	• Waste management	General management

Excellent manuals have already been developed by UN Habitat[12] and other bodies such as the Urban Institute[13] which makes the task of drawing up training material for a particular country a simpler task than starting from scratch.

[12] www.unhabitat.org/pmss/getpage.asp?page=download&alt=1&publicationID for volume 4 (Training Tools) of the series Key Competencies for improving local governance.Into which languages of the region has it been translated?
[13] Although based in the US, it has won numerous contracts in transition countries and developed manuals in areas such as local finance, communal services and housing - www.urban.org

6.4 Motivating the individual

And what assumptions are we making about our audience? When we define the target-group we need to think of them not just as holders of positions – but as individuals with experience, emotions, skills, information, behaviour. And we need to ask if it is facts, understanding, skills or new behaviour they need? And why do we think this? What proof do we have?

You may think your purpose is just to give the participants information – but the question is whether they will understand it and use it!! The English have a saying – "You can take a horse to water but you can't make it drink!" *The challenge for training activities is to ensure that your audience is motivated to understand and apply the information conveyed in presentations and papers!* That's why we have used Schumacher's quotation at the beginning of this section. Too many training sponsors think that those undergoing training are just empty vessels into which facts should be poured.

One of the delights of working with municipal personnel is their thirst for knowledge – unlike many civil servants, municipal personnel are faced every day with real problems crying out for solution. They are motivated – and are not satisfied only with facts. They want to solve problems!

And solving problems requires people skills – and that requires us to understand ourselves – our strengths and our weaknesses. Useful questionnaires are available which get people thinking - and go down very well[14].

6.4 The different purposes of workshops

Training workshops are used for a variety of purposes, including -

- Pass on information (eg a new Law)
- Help people understand how things work (eg property market; local finance)
- Build team spirit
- Stimulate people to see things in a different way
- Motivate them
- Get them to behave differently
- Help develop new skills (eg negotiation)
- Help people understand their role in a new project
- Help them pass an examination

One tool which (if used properly) helps clarify the precise purpose is that of "learning outcomes" – ie a detailed statement of the new knowledge and capacities the participants will gain as a result of attending the workshop. This is now an essential part of any workshop organisation – and, of course, sets the standard against which the results of the workshop are assessed. But too few training organisers treat it seriously enough. Used properly, it forces us to do two very important things -

- to make more explicit our assumptions about what knowledge and skills the participants have – and whether they are in fact correct
- to explore whether the way the course is structured will in fact develop the knowledge and/or skills. This doesn't happen just by lecturing at people!

6.5 The learning process - making our assumptions explicit and testing them

The final point, I think, to emerge from my recent experience is we need to encourage the people we work with to celebrate the learning process more. *The technocrats have been too powerful – for too long – encouraging people in a belief that "experts" could (and should) produce*

- *final definitions of needs*
- *formalistically-drafted "learning outcomes"*
- *definitive lectures and handouts*

This is not the way the world works! Our definitions are always partial – and our training will that much more powerful to the extent that we encourage trainers to treat as an open question what the needs of those at workshops are – and to realize that *they have as much to learn about how to transfer knowledge, understanding and skills as their "trainees" have to learn about the particular subject which is the focus of any workshop.*

[14] Eg Belbin; and strategic thinking

7. Designing the learning process

7.1 Five structures for Learning

It is one thing to to define a general learning gap – it is quite another to develop an effective way of closing it for a specific group of people. Too many training organisations and HRM managers assume that a traditionally structured workshop is the answer to their problems. Table 7 indicates the different approaches which have been taken to learning – and tries to identify their defining features, starting with the (implicit) assumption they make of the person being "trained".

Table seven; different learning approaches ("ideal types")

Approach	**Education**	***Workshop***	**Coaching**	**Action learning**	**Organisational change**
How the learner is defined	*student*	*Adult*	Junior member of a team	Autonomous manager	The organisation (or part)
Purpose of intervention	*Build understanding of particular knowledge field*	*Develop skills and understanding for work environment*	*Improved skills and behaviour for particular task*	*support innovative work*	Improved *organisational* performance
Setting	University class-room	Hotel	Work-place	University or hotel	Generally Work-place
Process	Generally continuous – eg university year but can be a short course	Short experience (1-5 days) which throws people together generally with strangers	Short but regular one-to-one sessions between a manager and his staff	participants (from diff organs) come together **at regular intervals** taking turns to present a current issue (case-study) – and receive feedback from group	Intensive series of meetings – facilitated or non-facilitated- to identify the organ's key problems and produce solutions
Key role	*Traditional instructor*	Trainer	Coach	Facilitator	Generally boss – and sometimes with help of facilitator/consultant
Teaching Style	*Assertive and didactic*	*Challenging and participative*	*collegial*	*Dialogue*	*various*
Assumption	That missing knowledge is best developed through courses and lectures presented by experienced and knowledgeable people	That a person performs (organ goals) better by facilitated groupwork with strangers	That new skills and knowledge are best developed through feedback to and dialogue about one's actions from a more experienced person	That a person learns from presenting – and receiving feedback from peers and colleagues – in a carefully structured and managed process on neutral territory	That understanding of and commitment to new ways of doing things is best done by open dialogue between colleagues
Problem	Memory retention low Passivity means that insights are second hand	Trainee returns to a work context which does not value his new insights and skills	Line management may find the new style too difficult	Good facilitator needed to be able to separate technical issues from social.	Consultation often nominal

7.2 Customising the training

Let's face it – a lot of training is "hit and miss". A course is offered – and specific individuals are told by the boss to attend. How do we really know that this particular subject – packaged (hopefully!) into a particular mix of presentations, discussions, tasks, working groups, case-studies etc ; and led by individuals with a particular mix of knowledge and skills – will actually lead to results? And results, furthermore, at two levels -

first for a group of people whom the trainers have never met before; and then for the organisations the course participants belong to?

The only answer is "custom-design" – ie that the course is designed with specific individuals in mind. All too often the focus of course design is simply the subject matter – what do people need to know, for example, to submit a successful bid for resources for a waste management plant? Such a question is, however, only the first question of the design process. Once it has been answered – and a list of "must-knows" has been drawn up, the next question is how much of this will the people attending the course already know?
And the only way, it seems, to answer that question is when the learners are actually sitting in front of the trainer. There is, however, a way out of the dilemma which includes some of the following options-

- Draft clear "**learning outcomes**". These are developed by the training managers and trainers (a) making explicit their assumptions about the skill or knowledge deficiencies of the learners and (b) then drafting statement about what the participant will know or be able to do at the end of the course. Drafting such a statement has the additional advantage of making those providing the training understand that the course will need to use more than presentations to achieve results.
- Contact some or all course participants before the course and invite them to articulate some of the questions and issues they want the course to help them with
- Ensure that the workshop starts with a properly organised session which can help identify the key issues or questions the participants want the course to deal with (casual questions about "expectation" rarely work)
- Adjust the course structure accordingly
- Treat each workshop as an opportunity to refine your understanding of needs and adjust the programmes and use of tools accordingly
- Test the knowledge of participants before and after the course (see section 8 below)

Of course all of this will be done only by trainers with a commitment to that style of working. When the trainer is a subject specialist with a full-time job in state administration, it will not be easy to do. And training managers are normally reluctant to insist that the trainers operate in such a way. The roles of the training manager and of the trainer - and the relationship between them - is a crucial issue we dealt with in section 6 above.

8. The "learning toolkit" – selecting the right tool

Box two referred to the different types of learning requirements. Each needs a different approach.

- **For knowledge?** If staff need to be updated with some new legislation, it's not immediately obvious that a workshop is the best way of doing this. Perhaps it would be better is someone was commissioned to draft a clear statement of the new policy/legislation and put it on the state body's intranet – with "frequently asked questions"? Alternatively, a module could be developed and placed on an E-learning platform. Or the relevant subject specialist could be hooked into a discussion with staff throughout the country via a video conferencing facility.
- **For skills?** If, however, staff need some skill development, a workshop is almost certainly the answer – but it will need very careful choice of trainers, tools and structure if it is to be effective. The training process - or cycle – contains so many points at which things can go wrong.
- **For changed behaviour?** Increasingly governments are looking for a special approach from their public servants – based on a recognition that they are there to serve the public - and that citizens have increasingly high expectations which require qualities of initiative in public servants. You can't get this sort of changed behaviour by running a few courses! That will just breed cynicism when the staff return to old-fashioned autocratic management. You will get it only when the leaders of state bodies demonstrate by their actions that they are in the business of change – and personally take charge of a change programme in which training is an integral part.

This section looks at the most frequently used tool for keeping local professional staff up-to-date with changing legal requirements - including

- Material on official website
- Lectures
- senior management briefing
- problem-solving sessions
- E-learning

Table 8 is a brief overview of the tools available to help spread understanding. The issues raised are developed in what follows.

Table 8; Tools for learning

Tool	Advantage	Disadvantage
“off-the-job” training/learning		
Lectures delivered at workshop	Administratively easy for training system	Relevance and quality difficult to control; learner passivity
Exercises	Engage interest; raise questions; simulate real world	Temptation to use only as “ice-breaker”. Needs to be preface to presentation.
case-studies	If “failure” presented, can help pose key questions Active involvement of participants	Difficult to construct Can easily distort or miss key points – and become “propoganda”
Site visits	Seeing for oneself Inspiration	Needs good organisation to make connection to learning Interrupts dynamic of workshop
Action learning	Discipline of having to prepare cohererent presentation Getting feedback and support Learning from practical examples	Requires careful facilitation if it is to be worthwhile
“on-the-job” training/learning		
Internet Training material (eg “Frequently asked questions”)	Very accessible Administratively easy for training system	Participation is voluntary – and only motivated staff will use it.
Coaching	High coverage of staff	Line managers may have difficulties in learning coaching skills
E-learning – with tutor interaction	Very accessible; cost effective	High demands on training management Does not allow use of some powerful learning tools
Regional consultations (see section 9.4.1)	Active involvement of participants	Takes instructing staff out of their work

Our discussions have clearly indicated that - although there is a continuing need for technical training in new aspects of the relevant acquis - the greater need is to have support system for those officials at local level as they encounter and try to deal with the problems of enforcement. One state body put this very clearly – “We understand the text of the various procedures on equal opportunities – but that is a completely different matter from the various levels of management understanding why the various forms of discrimination occur; are unacceptable; and can and should be changed”.
The basic question we have to look at is what tool or structure is best able to ensure that the official is really motivated to understand and is able to use the new legal framework to achieve compliance? Simply reading a new law, ordinance or set of guidelines – or listening to a lecture about new requirements – does not bring understanding or develop the skills needed to ensure compliance!

We will now look at the contribution each of these can make in a more integrated system of learning – and the role they might play in our project.

8.1 Lectures

Various criticisms are levelled against short-courses -

- They take people away from their work;
- They cost money which may not be in the budget
- They are often theoretical – not properly related to work problems;
- They rely too much on passive forms of learning – with participants quickly forgetting the material.
- Those attending rarely get a chance to shape the contents and structure of the workshop

Little can be done about the first two points – save to say that it is essential from time to time that people get the chance to reflect critically on their work away from their work context where they can be so easily distracted. It is doubtful whether a course can be justified which simply presents – by lectures - new legislation to officials. Such a presentation can be done much more cheaply by an explanatory paper or Guidelines – which can be circulated or made available online. The trouble with both these approaches – the lecture and the circular or online paper – is (a) that the learning is passive (with all that means about retention) and (b) we don't know what has been understood – let alone retained.
A properly organised workshop offers various advantages –

- the agenda can be shaped by the participants
- the instructor can be questioned
- typical problems and cases can be analysed
- if role playing is used, participants get a chance to recognise some skill deficiencies and work on them
- questionnaires can identify the learning that takes place during the workshop - and also the retention.

A workshop with these features creates and active and motivated group of participants –who therefore learn and retain more. But these features require considerable prior organisation and skills. Workshops should not, however, be held unless the organisers are confident that (a) the features are in place and (b) will be carried out effectively.

8.2 Case-studies

There are at least very different three types of case study -

- Two sorts which try to develop **analytical skills** – and require the participant to apply various bits of knowledge to a concrete situation. One is historical; gives the participants basic information about a situation and the outcome (generally a failure) and asks them to identify the reasons for the failure. Another (known as the Harvard method) gives the participants very detailed technical information (mainly financial) and asks them to make a recommendation.
- The final type tries to develop **skills and personal insights**; gives the sort of information the Harvard case study gives – but then requires each of the participants to adopt and play a role.

In our Discussion Paper we distinguished three types or levels of training for implementation and enforcement of the acquis –

- Effective Management systems
- Legal and technical aspects of the particular acquis
- Enforcement and coaching

How useful can case-studies be for these 3 levels – and what sort of case-studies are available?

8.2.1 Effective Management systems

The last decade has seen the development of various tools to help state bodies operate more effectively. The Common Assessment Framework – developed by EFQM[15] – is extensively used by European state bodies as a

[15] European Foundation for Quality Management (EFQM); See recent paper - CAF Works (EIPA 2007) For one of the few neutral assessments, see "The introduction and use of quality management tools in candidate countries" C Engel (EIPA 2002). See also Administrative Capacity in the New Member States; the limits of innovation? (World Bank December 2006) Report number 36930-GLB

self-assessment tool. A national example is Dolphin software – managed by Civil Service College with self-assessment questionnaires completed by state bodies, returned to CSC who then gave feedback[16].
For such a system to work, the usual two things are needed – a demand and a supply! Someone has to be capable of offering a service which people want and (presumably) are willing and able to pay for.
Another simple tool which has been extensively used is that of "peer review" – which also gives a useful base for case-studies.

8.2.2 Technical aspects of acquis
Section 9.4.1 below discusses one simple way in which problems being experienced in the field could form the basis of masterclass. The project could develop a simple proforma which could be used for this – and, with proper management, this could allow case-studies to be developed in a coherent way

8.2.3 Enforcement systems
The good practice available on the acquis-related websites we have mentioned in 3.2 can easily be used in case-studies. Again, however, the linguistic issue arises.

8.3 Coaching sessions by managers

8.3.1 What is coaching?
"Coaching" and "mentoring" have only recently been added to the list of management tools. The next table sets out some of the features of coaching compared to the more familiar roles of teaching and training.

Table 11; summary of different learning systems

	Education	**Training**	**Coaching**
The subject	The student or practitioner	The practitioner	The practitioner
Focus of study	A field or body of knowledge	A set of skills	How problems are dealt with in everyday work
Setting	Class-room	Work-shop	Work-place
Process	Generally continuous – eg university year but can be short course for (say) new acquis	Intensive 1-5 day experience which throws them together generally with strangers	Short but regular one-to-one sessions between a manager and his staff
Key role	Teacher	Trainer	Coach
Style	Didactic	Group Exercises	One-to-one and group dialogue
assumption	That missing knowledge is best developed through courses and lectures delivered by experienced and knowledgeable people	That a person performs better when (s)he understands themselves better – and will gain important insights from facilitated groupwork with strangers	That new skills and knowledge are best developed through feedback to and dialogue about one's actions
Problem	Passivity means that insights are second hand	Trainee returns to a work context which does not value his new insights	Line management may find the new style too difficult

Note; the author asserts his intellectual rights to this table

We must first appreciate that there are at least 3 very different coaching roles – which are best seen as points in a spectrum. Bulgaria is familiar with the **first** of these meanings – since, traditionally, the staff member to whom a new recruit was assigned at the induction stage[17] was given that term. And a recent document indicated that this practice was to be introduced to state administration. The coach is supposed to introduce the new recruit to the procedures and expectations of the organisation – answer the recruit's questions and help him or her deal with various problems which arise.

We are all familiar with the **second** meaning – which is found in the sports sector. Sports coaches deal with highly experienced and famous clients – giving them detailed feedback on their performance and offering

[16] the project has the system
[17] See page 8 of the Strategy for Training the Employees of state administration (undated – but probably 2005)

them options for improvement; and the practice is spreading to the commercial sector. Some very senior managers recognise that the decisions they take are so crucial (and the pace of their life so fast) that even they need coaching – and some people are available to help them. Only a few people, of course, can aspire to be full-time coaches.

The **third** use of the term relates, however, to a method of managing teams. Too many of those who manage staff do so by instilling cultures of cynicism and fear; and this generally means poor performance and non-achievement of goals. In this style of management, problems pile up on the manager's desk since staff do not feel confident to deal with them. "C*oaching", in this definition, is a set of additional skills for the manager to enable him to develop, in turn, the skills of staff to deal with problems in a more effective way*. The modern manager or boss has to supervise staff in a way which helps them learn from their experiences - through advice, encouragement and organised feedback. Good coaching skills create a motivated team – able to learn for themselves. And that, in turn, creates the environment in which other tools also come into play. Coaching helps make a reality of delegation – and gives the manager the time to operate more strategically. The project was able to develop and publish a Coaching Manual.

8.3.2 Is there a demand for coaching skills?
During the Inception stage we had some questions about whether line managers would be motivated to attend the courses we would offer in coaching skills. However, now that we have recognised that coaching skills are part of the essential toolkit of those charged with the responsible for enforcement of the acquis, we would judge that a module on this would be seen by managers to be very useful – but only if it is part of a wider and systematic support package. Although we have heard at least 2 Ministries indicate that they were giving priority to the development of a coaching role, we suspect that this refers to the traditional "role-model" for new recruits. And we do need to be aware of some of the cultural resistances to adopting what may by some older managers be seen to be a "softer" role.

8.4 Other tools

8.4.1 Surgeries or master classes (of visiting experts)
The Training section of the Ministry of Labour has decided to try out an experiment of sending some its specialists out into the field to hold question and answer sessions with field staff. This puts the onus on the local official to produce the raw material on which the session is organised and is therefore much easier to organise than a workshop of the sort just described. However it does require officials to prepare for the session properly – perhaps by sending an indication in advance to the visiting expert of the problems they are encountering. The project hopes to monitor and write up this interesting idea.

8.4.2 A website with Frequently Asked Questions
This is a streamlined version of the above – and can be provided either for open access (for public) or for more restricted access (officials).

8.4.3 Action learning
As the pace of modernisation steps up, the demands on middle and senior Ministry staff for good policy and organisational advice increases. This requires them to develop their knowledge in specialist areas.
In the absence of real experts and trainers, motivation for attending traditionally-structured courses will not be high: and people in the middle of reorganisation will not be willing to allocate their scarce time to such an activity. This paper has indeed indicated that such courses would not be of much assistance to them!
A powerful method of learning can, however, be involvement in "networks of learning". There are several variants of this. In essence, it brings together - on perhaps a monthly basis - a small group of individuals who are involved in establishing something new. With the support of an expert/trainer, they reflect on the process and explore how they might be assisted in their work by further knowledge or skill development.
"Action learning" is a powerful learning process which allows managers (whether from the same or different organisations) to come together to shape their own agenda for learning.

To those accustomed to traditional forms of education it may look too informal if not anarchistic; it does, however, have clear conditions and rules such as -

- the support of top management
- structured input of participants
- a questioning dynamic

- a clearly defined role for the trainer[18]

Such an approach is generally highly effective not only because it generates strong motivation: but also in developing good personal working relationships across departmental and agency boundaries.

- there is no need for a pre-defined syllabus to a learning programme: indeed it is constraining and unhelpful
- learning should start from the needs of the learner and the organisation: individual differences need to be recognised
- learners need to play an active role in learning: passive reception of knowledge encourages passivity in management
- learning needs structuring and supporting: it does not just happen. Liberating people from the constraints of traditionally taught courses does not of itself produce good learning.
- learning in collaboration with others is crucial: particularly if this is what we want in the work-place.
- resources are needed to support learning: but these may not be of the traditional sort.
- leadership is important: organisational leaders need to model good learning.
- all learners are able to draw up statements of their learning needs: and negotiate these with their organisation (as "learning contracts")
- the results of learning need to be assessed and evaluated : but this must be initiated by learners and not imposed.
- the roles of those assisting other people's learning are crucial. Helping someone to learn is not easy - and this process also needs to be learned.

Cunningham Ian[19]

8.5 Conclusion

We said at the beginning of this section that the basic question we had to look at is what tool or structure is best able to ensure that the official is really motivated to understand and is able to use the new legal framework to achieve compliance? Simply reading a new law, ordinance or set of guidelines – or listening to a lecture about new requirements – does not bring understanding or develop the skills needed to ensure compliance!

We then looked at various training tools – but we need now to ask the question about "motivation". A famous person[20] once said "I love learning – but I hate being taught!"

If officials are motivated then they will positively search for ways to improve compliance – whether that requires them to improve their own understanding of the law or to look critically at the relevant and impact of the compliance procedures they are using.

So how can they be motivated? The answer lies in the actions of their boss and those in senior management. That's why coaching is important.

That's why compliance strategies should be developed in a participative manner. If staff feel their contribution is recognised – and are involved in the setting of priorities, monitoring and policy change – there will be a higher chance of compliance. <u>The key, therefore, is the development of a learning – rather than training – strategy.</u>

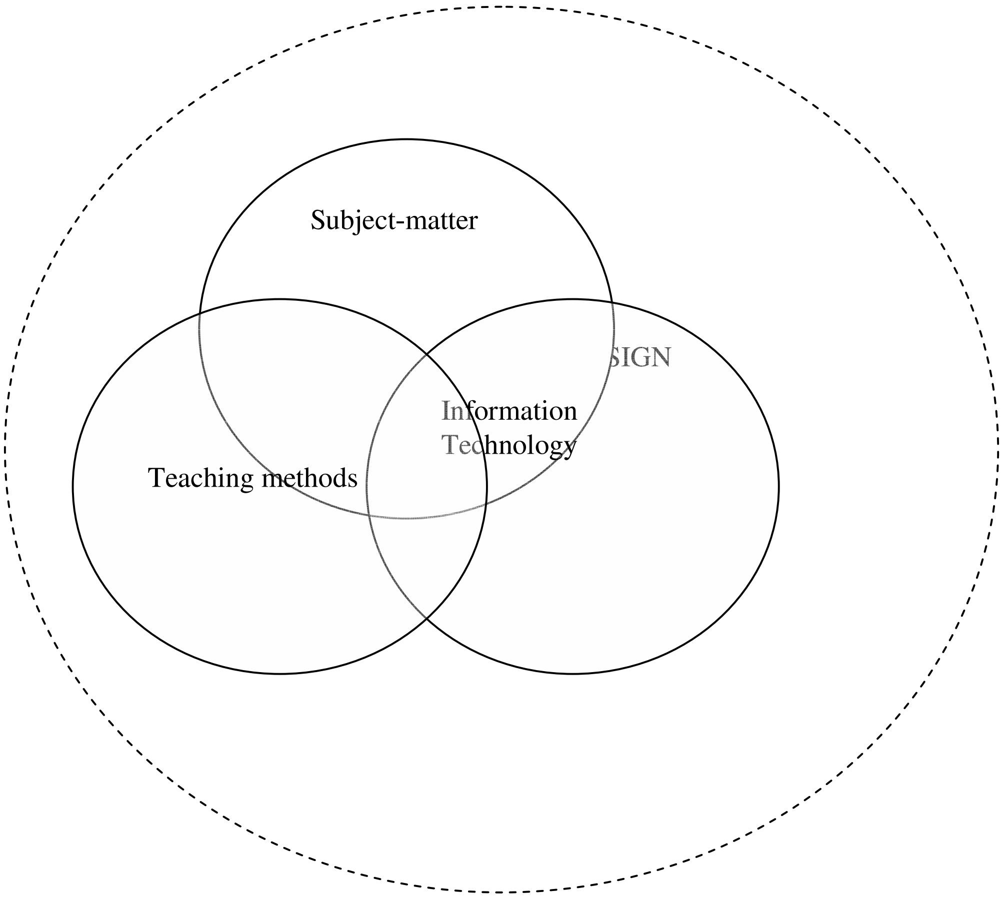
[18] see <u>Action Learning</u> by Weinstein
[19] <u>The Wisdom of Strategic Learning - the self managed learning solution</u> (McGraw Hill 1994)
[20] Winston Churchill

9. Distance and E-learning

9.1 Its role

E-learning has attracted a lot of attention and slowly becoming a reality. Most material on E-learning platforms is the subject of quality control that is often missing from workshops – which are less stringent in their approach to the quality of the teaching material.
Those charged with funding and managing training events do need to be very rigorous in selecting the most appropriate learning structure for trainees. As a rule, when it is skills which need to be developed – eg coaching and training – face-to- face workshops are needed. The dissemination of knowledge can be done by distance and E-learning. Like everything associated with IT, there are quite a few examples of bad practice around[21]. One of the main requirements is to ensure that the technology is the servant and not the driver of change[22]. Separation between the trainee and instructor put more demand on design and delivery of the distance learning than conventional trainings and also coaching. Thus it is vital to follow certain principles in course delivery, and programme/course design.

9.2 a process for developing E-learning material



Roles and types of expertise needed:
Three groups of people are needed to produce E-learning modules – and they do not normally find it easy to work together!

- **Subject-matter expert**, responsible for developing the content of the course. Reviewer of the accuracy of the final content

[21] For example, a DOLCETA E-learning system which purports to be a training programme for consumers but which is structured around the legal framework – rather than the typical problems faced by consumers.
[22] See "The insider's guide to becoming a rapid E-learning Pro" (online)

- **Teaching/learning expert**: specialist in transposing subject-matter content into training material easy adaptable to e-learning model; creator of course script;
- **ICT Expert:** specialist developing course components: parts of screen, HTML codes, exercises, animations based on content provided, and course scenario, combining separate elements into aggregates (topics, lessons, and modules).

Preparation of e-learning course

***a.* Division of responsibilities**
Development of electronic materials requires a continuous cooperation of the whole team consisting of specialists with certain knowledge, methodical competences, and technical qualities.

So the key thing for the successful development and implementation of e-learning is to:

- assign the roles and define the duties of each team member (on this basis we can specify the requirements for candidates for each position and draft a Job description) and the range of duties involved, what enables us to engage into a project only people with sufficient qualifications, skills and abilities needed for successful
- establish key dates

b. The crucial role of the institution commissioning E- learning
An institution interested in implementation of an e-course either for internal corporate purposes or for external target group has to define the overall goal of the courses and the profile of the target group (recipients), accept the e-course's content, its scenario and the final version of the e-course.

c. Preparatory meeting of the Team
The most important thing though, is to make the experts aware of the fact that in e-learning courses we continuously concentrate **on the needs of the learning person (trainee**), who is the subject of the educational process. An e-course, leaves the student all by him/herself - so we must design the course in such a way to facilitate navigation within it: student must be able to find easily everything that he/she needs, both key and supplementary materials. We also should provide him/her with a possibility of auto-assessment and getting the feedback on the level of material's apprehension.

At the meeting participants should discuss and agreed upon all relevant guidelines for the course, including:

- **the aims of the course**, i.e. the range of knowledge and particular skills, which the participants of the course will acquire – present the list of concepts to be comprehended, skills to be developed,
- meticulously described **target group**, to whom is the course designed for, since it will influence its style and a relative depth
- what is an intended **length of a learning unit** – how much time will the participant have to spend to do it and what the workload is supposed to be (an extremely important issue as far as courses designed for professionals are concerned);
- **present the tool** (provided that it is already available) that will be used to convey the course thoroughly describe the tool and explain its capabilities, e.g. possibility of using a chat-room or message board, various interactive exercises and tests. This will allow the expert not only to develop his/her own idea of the course but also to design it in a way that fully corresponds with the potential of the learning tool;
- emphasize the need to **design an attractive course**, i.e. the one that will utilize the elements which will captivate our attention and engrave gained knowledge in our memory. For that purpose you can use: text, graphics, audio and video. Jointly discuss what can be appealing for our target group.
- **define in details the requirements** posed to the authors of the contents

The best way to do it is to create a **manual,** or paper, or multimedia tutorial that will elucidate and clarify the conditions which the authors will have to fulfil; this will ensure that we obtain bespoke e-materials.
The document ought to contain all information concerning our expectations as far as the materials are concerned, in particular:

- the range and scope of the training,
- course's time limits and structure– we indicate expected time framing of the whole course in general and of modules/units in particular (in practice it means that we specify the course as a thirty-hour

long and expect the material to be designed in such a manner that a student will not need more time to finish it),

- linguistic specifications – we determine a certain language level (a style) compliant with the target group,
- depth of the course, i.e. a division between substantial and supplemental knowledge,
- additional materials essential for every e-course (including e.g. graphics illustrating the merit contents or – if they are unavailable – their detailed description),
- assessments and examination methods – self-check tests, assignments, tests, exams, etc.
- required formats for the materials, i.e. whether these should be *.doc, *.rtf, *.txt, or copy able PDF files,
- deadlines, schedule for further meetings that defines expert's availability and sets out appropriate time for corrections or additions to the material he/she has delivered.

The whole team responsible for a preparation and implementation of the training should take part in the prefatory meeting. From the very beginning of the work on the e-course, it is vital for the responsible team members to know each other as well as to know precisely the task division.

Developing the e-course
This requires the close cooperation of the author and an instructional designer, who is simultaneously an advisor and a stimulator. The author and the specialist have to agree upon:

- structure and division of the material,
- graphics and multimedia,
- formats of interacting tools,
- course's organization.

a. Structure and division of the material
The key questions to be solved is HOW knowledge is going to be delivered, how the materials are going to be divided (what the structure of the course is going to be like) a including division into sub-modules, chapters and ways of navigation among them.
Various structures can be applied such as: simple linear structure, complex structure, tree structure or multi-level structure - depending on the character and complexity of the didactic material, the way of organising the course and available tools,

Choosing any of them must serve a specific purpose; nonetheless we have to remember that applied structure must have certain invariable parts such as:

- **introduction** – this is where students begin, therefore it should describe unit's main contents and learning goals, indicate key words that might be unintelligible. Moreover, we detail merit material and addressed issues;
- **main body** – when composing main body do not forget that it has to be clear and understandable. In order to achieve it, divide the material into smaller, and hence manageable, units;
- **summary** – in a summary we refer to the didactic goal indicated in introduction and explain how it has been achieved. This part should summarize/remind the most important issues addressed in the material (the main body);
- **assessment** – this is an enormously important element of the given unit whose solely purpose is appraisal or self-check of acquired knowledge. Assessment may have various forms, e.g. test (multiple choice, single choice, true-false, object comparison), control questions, assignments, exercises or other available forms of verifying gained knowledge;
- **supplemental materials** – in e-learning we ought to avoid a bulky course load. Therefore, a decision should be made which information will be incorporated directly into the lessons and which will be submitted as supplemental materials, i.e. bibliography (obligatory or recommended),
- **indexes, references, download** (e.g. pps slide shows), etc When you choose the presentations and divide material, remember that the structure ought to be homogenous for the whole course. Applying particular type within one module/unit, we should build the consecutive ones upon the same pattern. It will prove not only the professionalism – we deliver well designed, orderly course – but also it will allow better navigation, and thus the students will easily be able to find the course issues that interest them.

Text layout is another significant element of the course's structure. Too long paragraphs can daunt and discourage (bore) the student, thus so called atomization of contents is often recommended.

Course organization

Concept of the E-course has also to involve the vision of the training's delivery, including: general admission requirements – advertising the course, application process, entry requirements and details on its administration. To clarify that the separate document has to be produced and specifying the application process in details, e.g. it can have a form of general terms and conditions, terms and conditions of undertaking the course, including: rules of logging into the platform, principles and ways of informing the students about the course's progress, e.g. utilization of the calendar, internal post or messenger and all other available forms of elicitation such as message board, chat- room or team-work.

Tools available in distance learning offer diverse capabilities under this respect. For example calendar – it enables the students with a possibility to follow all current activities as the course progresses (in calendar we can announce the opening dates of lessons, meetings in the chat-room or deadlines for assignments' submission), messenger (internal post) – is a main mean of communication between the student and the tutor; messenger serves also to remind the students about certain events (e.g. approaching deadlines),- message board (separate for each module) – this is a space given to the student in order to give them a room for free exchange of opinions but also useful for assignments designed for teams, - chat-room – meant to provide a direct contact with the tutor in order to discuss with him/her the most problematic issues.

10. What sort of trainers?

Table 7 below was developed during one of my projects – and offers a possible typology which will hopefully stimulate discussion. It indicates that different types of people are used as trainers – with each bringing something to the event which others don't but, at the same, time having a certain weakness. **Academics**, for example, are subject specialists – used to telling their students what they have to do to pass examinations! And any practical experience they have is generally out-of-date.

Those who are **practising experts** in Ministries are strong on the law – and probably have had reasonably recent experience of trying to apply it locally. But they will have had little training in structuring the knowledge to make memorable presentations and generally have little experience of using discussion groups let alone case-studies effectively.

And then there are those (generally younger) who have been trained as trainers – but do not have the subject knowledge or experience to be trainers themselves. But they make excellent **moderators** – able to identify in advance what knowledge or insights a particular group of people need; able to find the trainer who seems most appropriate; and to structure the event in the most effective way. Such a person is necessary to try to ensure that expert trainers actually deal with needs of workshop participants

Table 7; Roles and strengths of different types of trainer

	Practitioner	Moderator	University Lecturer
Based in the capital	Strong on legal aspects; weak on problems of local implementation Tends to use traditional non-interactive teaching methods	Generally strong on moderation skills and encourages interaction Can lack understanding of local context	Strong on theory; weak on practice and problems of local implementation Uses traditional non-interactive teaching methods
Resident in regions	Strong on local practice – sometimes weak on presentation skills	Reasonable understanding of local context Moderation skills not as developed	Strong on theory; weak on practice and problems of local implementation Uses traditional non-interactive teaching methods

The challege facing all trainers is how to ensure that the participants on their courses are motivated to learn. Some of this lies outside the influence of the trainer – and is determined by the process which selected (a) the subject and (b) the participants. If the training is linked to a change programme at the work place and the participants feel they have been able to shape the course agenda, motivation will be high. But motivation also depends on the attitude the trainer brings to the workshop.

In a recent project, we worked exclusively with subject specialists – who, by virtue of their expertise, could not readily accept that they had a lot to learn about presentation and the learning process!

Indeed, in all projects I've worked in, I've had difficulty with the very word "trainer". Ina glossary I drafted recetnly I defined Trainer as "someone who has the skills and experience to set up the environment in which people learn for themselves – through case-studies, role playing etc. Too often the word is used to describe "instructors". There are lots of views about what makes a good trainer – box 2 is a typical list -

Box 2; Profile of a good trainer

- Well prepared sessions - and resources
- Variety of teaching methods used
- Good relationship with the trainees
- Interested in the needs of individual trainees
- Easy to understand
- Knowledgeable about the subject
- Makes students feel enthusiastic
- Create a good learning atmosphere
- Friendly and enthusiastic
- Uses appropriate language/humour
- Supportive
- Respectful of individuals

- Experienced
- Gives praise and highlights success rather than failure

That's quite a demanding list! I have drafted recently a paper on Assessment methodologies which contains forms to help training managers to assess the performance of a trainer – using some of these qualities. A critical question is how such qualities can be developed in trainers – particularly those don't see themselves as trainers but as subject specialists.
A lot of "training of trainer" courses concentrate on the techniques - of presentation, for example. A lot of this can be helpful but we suspect that the main feature which creates a good trainer is an openness of mind.
Somone who is interested in a subject; is aware that he is always learning; and who see opportunities for advancing that learning in every encounter with another human being is the sort of person who most easily demonstrates the qualities needed from a trainer – respect, knowledgeable etc

11. Defining learner oucomes

Let's face it – a lot of training is "hit and miss". A course is offered – and specific individuals are told by the boss to attend. How do we really know that this particular subject – packaged (hopefully!) into a particular mix of presentations, discussions, tasks, working groups, case-studies etc ; and led by individuals with a particular mix of knowledge and skills – will actually lead to results? And results, furthermore, at two levels - first for a group of people whom the trainers have never met before; and then for the organisations the course participants belong to?
The only answer is "custom-design" – ie that the course is designed with specific individuals in mind. All too often the focus of course design is simply the subject matter – what do people need to know, for example, to submit a successful bid for resources for a waste management plant? Such a question is, however, only the first question of the design process. Once it has been answered – and a list of "must-knows" has been drawn up, the next question is *how much of this will the people attending the course already know?*

And the only way, it seems, to answer that question is when the learners are actually sitting in front of the trainer.
There is, however, a way out of the dilemma which includes some of the following options-

- Draft clear "**learning outcomes**". These are developed by the training managers and trainers (a) making explicit their assumptions about the skill or knowledge deficiencies of the learners and (b) then drafting statement about what the participant will know or be able to do at the end of the course. Drafting such a statement has the additional advantage of making those providing the training understand that the course will need to use more than presentations to achieve results.
- Contact some or all course participants before the course and invite them to articulate some of the questions and issues they want the course to help them with
- Ensure that the workshop starts with a properly organised session which can help identify the key issues or questions the participants want the course to deal with (casual questions about "expectation" rarely work)
- Adjust the course structure accordingly
- Treat each workshop as an opportunity to refine your understanding of needs and adjust the programmes and use of tools accordingly
- Test the knowledge of participants before and after the course (see section 8 below)

Of course all of this will be done only by trainers with a commitment to that style of working. When the trainer is a subject specialist with a full-time job in state administration, it will not be easy to do.
And those who commisson training are normally reluctant to insist that the trainers operate in such a way. The roles of the training manager and of the trainer - and the relationship between them - is a crucial issue addressed in the next section.

12. Roles in Training

12.1 Four key roles

At least four different groups are involved in any training –

- The **client** – who commissions the training
- The **training manager** – based in the training centre: who helps define the learning outcomes; ensures the course structure is designed to meet these; selects and briefs the instructors; and gets the participants to the agreed location.
- The **instructor** (trainer) – who prepares and delivers the training material
- The **learners** – who should have control over the course structure and their learning process[23]

With E-learning we add a fifth – the provider of the technical infrastructure.
A friend and colleague[24] and I developed recently the diagram overleaf – which looks at each of the four roles and tries to define (a) what each person needs to bring to the process if training is to be effective and (b) the results (or outputs) which should come from the **dialogue** which is needed between each group as we move through the training cycle. Learning outcomes, for example, come from a proper discussion between the client and training manager to which the latter brings questioning and analytical skills to make sure that the learning outcomes are relevant and realistic.

12.2 How can these roles be properly developed?

My feeling is that <u>effective training systems require two things</u> –

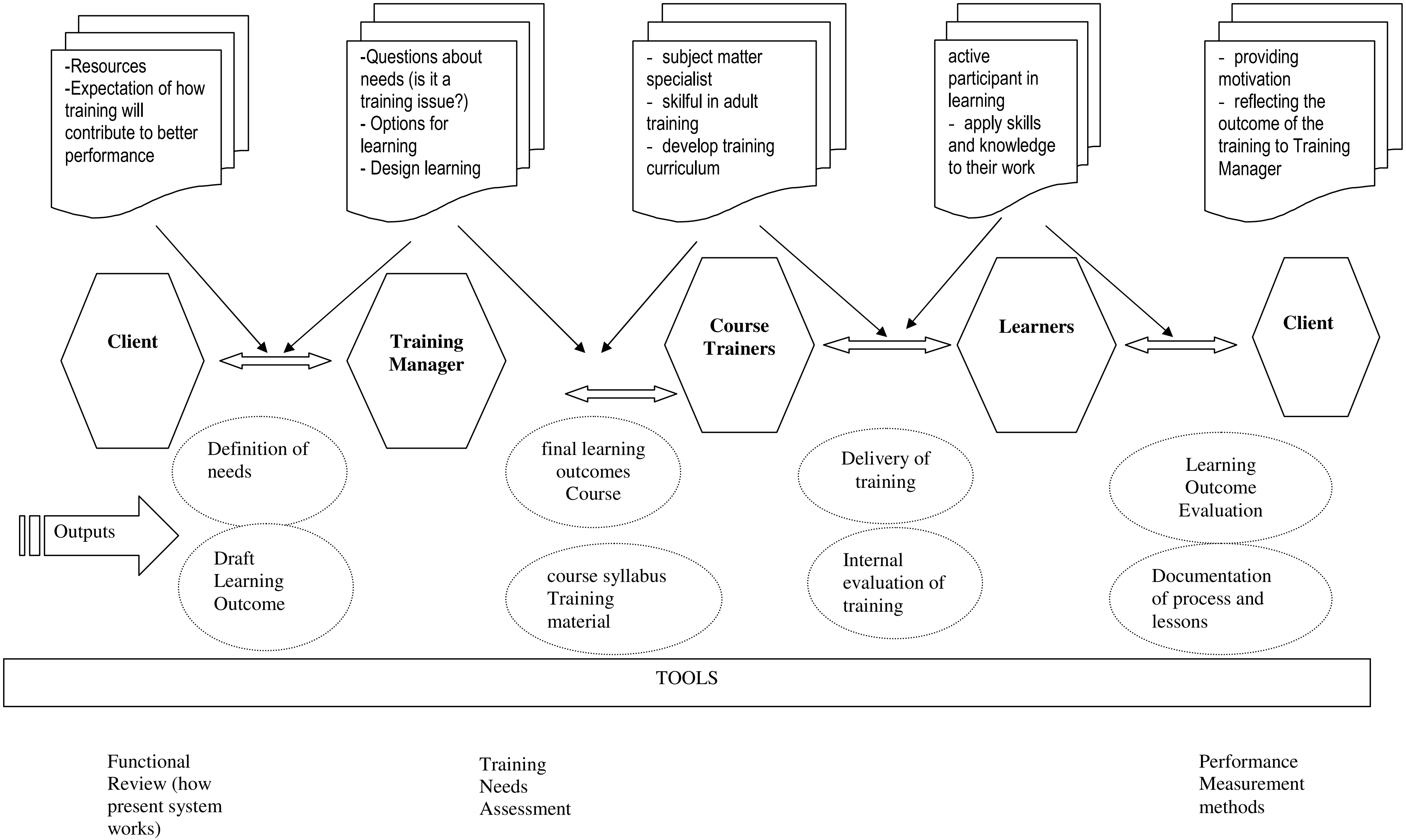
- **A system which ensures such a dialogue actually takes place**. I am not generally a fan of procedural documents (the EC has far too many of them!) But a written document which sets out a set of procedures and roles – and which the various people involved in training feel obliged to follow – would help.
- **Mechanisms** which help each partner to this dialogue **better understand his/her role –** and **develop their capacity** to play it.

Some possible mechanisms -

- **Develop a professional training ethic**; The diagram also emphasis the importance of training managers and trainers commiting themselves to "continuous learning" – and treating every workshop as an opportunity of improving their understanding of needs and refining their learning tools and skills.
- **Strengthen the consumer voice ;** Achieving improvements in systems always requires operating on both the demand and supply side. So far, we have dealt only with the supply side – the activities, skills and behaviour required of trainers and training managers. **But change generally needs pressure from the demand side. Clients, for example, need to know what it is reasonable to expect from training**.
- **Create a "training community"– consisting of those involved in different roles in current training;** create a real training community or network which can bring together the various groups listed above to supply a real impetus for change.
- **strengthen the role of training manager;** A problem frequently encountered is that training managers do not have the status, time and confidence to ensure good learning outcomes and monitoring of course structure and materials and trainer performance. Too often, too much, is left to the instructors – who, as subject specialists, are assumed to have the knowledge and skills to package their knowledge in a way which leads to effective learning. But being a subject specialist and being a trainer are two entirely different things! How can training managers play a stronger role?

[23] Since they are adults
[24] Daryoush Farsimadan – with whom I worked in both Kyrgyzstan and Bulgaria recently

Roles of Each Part and Outputs



13. The role of certification, accreditation and assessment

13.1 Be careful about certification!

The terms of reference of a recent project of mine invited us to set up an accreditation process for training centres and trainers. I felt strongly that this was a mistake – I put it as follows -
"Public servants throughout Europe have been under increasing pressure in the last few decades. More is expected of them – and their training has, as a consequence, been given great importance. Training systems have become much more sophisticated – and are resourced accordingly. What were the factors in other countries at a similar stage of development as those in the Balkans which gave the impetus to change and improvement? Did formal accreditation played in these countries in the development of civil service training systems? This is a critical question – which leads us to make the distinction between "drivers of change"[25] and "certification". The latter is a check on quality which, of course, can act as an incentive for the improvement of quality for trainers and training centres. Historically, however, it has come into play only after the drive for improvement has reached a critical point[26] – and when experienced trainers exist to act as credible certifiers. It has rarely (if ever) been a driver of change. Indeed it can, paradoxically, stifle the conditions for improvement!"
NISPAcee has an important working group which, for some years, has been sharing experience on such issues – and some of papers presented at this forum are worth consulting[27]. And it has now introduced a European system of peer accreditation[28].

13.2 and of being overcomplex

There are too many complicated assessment systems around which, as a result, are rarely used. My position on assessment can be summarised in four short assertions –

- assessment is important
- people are reluctant to practise it
- without clear written standards and procedures it cannot be done
- but they should be kept simple!

Most workshops will issue a brief questionnaire at the end of the workshop which asks participants such things as –

- were their (generally undefined) expectations were met?
- How useful they found specific sessions or trainers?

That is useful feedback (although participants are often too generous) – but it does not help us assess the contribution the course made to the workplace. It is level one of the four-level model for evaluating training programmes which Donald Kirkpatrick developed in 1959 which is outlined in the table. This is still is the most widely used approach to training evaluation in the corporate, government, and academic worlds.

Box 3; Kirkpatrick 4-level model of training evaluation

Level 1 Reaction: Did participants like it?
Level 2 Learning: Did they learn?
Level 3 Application: Did they apply the new skills or knowledge on the job?
Level 4 Results: Did the change in behaviour positively affect the organization?

Kirkpatrick's model provides a conceptual framework to assist in determining what data should be collected for evaluation purposes. This data collection and evaluation process must be planned as part of the design and development segment of lesson preparation. Otherwise, it is possible to miss an

[25] See useful paper from OECD governance network – Lessons learned from use of power and drivers of change analyses in development cooperation - www.oecd.org/dataoecd/24/2/37957900.pdf
[26] The UK system, "Investors in people", for example, was established in 1991 and has taken some time to build up its position – for a useful overview see Investors in People Maintained by P Taylor and R Thackwray (2001 Google books)
[27] At www.nispa.sk/_portal/homepage.php See, for example, "Quality Assurance of public administration programmes in Poland" by W Mikulowski (2002)
[28] "EAPAA peer review accreditation and its potential to strengthen PA education: the case of CEE countries" by Juraj Nemec in Post-Communist Public Administration; restoring professionalism and accountability - Proceedings of 14the NISPAcee Annual Conference ed Coombes and Vass (NISPAcee). He has updated that in the latest book from NISPAcee

opportunity to collect data which is needed for the evaluation process. The Kirkpatrick approach is therefore a challenging one and not easy to use in its entirety – as table 8 demonstrates

Table 8; Four Levels of Evaluation of Training based on Donald L. Kirkpatrick's Evaluation Framework

level	evaluation type what is measured	evaluation description and characteristics	examples of evaluation tools and methods	Practicability
1	**Reaction**	**reaction evaluation** is **how the delegates felt** about **the training or learning experience**	eg., feedback forms also verbal reaction, post-training surveys or questionnaires	quick and very easy to obtain not expensive to gather or to analyse
2	**Learning**	**learning evaluation** is the measurement of the **increase in knowledge** - before and after	typically assessments or tests before and after the training interview or observation can also be used	relatively simple to set up; clear-cut for quantifiable skills less easy for complex learning
3	**Behaviour**	**behaviour evaluation** is the extent of **applied learning** back on the job -	observation and interview over time are required to assess change, relevance of change, and sustainability of change	measurement of behaviour change typically requires cooperation and skill of line-managers
4	**results**	**results evaluation** is the **effect on the business or environment** by the trainee	measures are already in place via normal management systems and reporting - the challenge is to identify the trainee's contribution	unrealistic to expect results without extensive training programme of all staff

13.3 Keeping it simple

Despite the difficulties of measuring the last 2 dimensions, the Kirkpatrick approach does remind us that workshops – and training material – cannot and should not be treated as ends in themselves. Sadly, that is all too often how they are seen. But courses are means to an end. And that end or objective is the more effective implementation of a new policy (eg a different inspection "regime" or set of procedures). So someone needs to check in advance that a course has been designed in a way which is likely to lead to better organisational performance. The Kirkpatrick approach is a model for post-hoc evaluation. We need ex-ante evaluation as well. And Kirkpatrick also misses some dimensions which might be called "proxy" – eg check of use of agreed learning tools. I would suggest that it is realistic for normal training managers – faced as they are with deadlines and small budgets - to assess –

- **Relevance** (is the course material and structure likely to help the individual or organisation perform better?)
- **Participant Learning** (Did the course help the participants develop the understanding or skills the "learning outcomes" said it would?)
- **Training material** (do they reach an agreed standard?)
- **Use of agreed learning tools** (did the trainers do what they said they would?)
- **Participant satisfaction**
- **Performance** (how well did the trainers perform?)
- **Trainer learning** (what did the trainers learn about participant learning needs – and how they could better be met?)
- **Training institutions** (are they managing their staff and resources in a way which achieves results?)

Table nine below suggests how each of these might actually measured.

Table 9; an overview of assessment

Factor	Key question	How can it be answered?
1. Course Relevance	is the course material and structure likely to help the individual or organisation perform better?	The context in which the course participant is working is described. Missing knowledge and skills are then defined in a needs assessment; **learning outcomes** required – and a course structure and materials which allow these outcomes to be achieved.
2. Participant Learning	Did the participants develop the understanding or skills the "learning outcomes" said it would?	Test before and after the course OR Ensure that learning outcomes are presented and agreed at the start of the course; and that feedback forms ask about this
3. Training material	Did the handouts meet the required standard?	Standards are drawn up and used
4. Participant satisfaction	Were their expectations met?	They are asked at the beginning of the course what these are – and then asked about it at the end
5. Trainer Performance	how well did the trainers perform?	Ask participants to rate trainers on an agreed scale. Independent assessment
6. Trainer learning	what did the trainers learn about participant learning needs – and how they could better be met?	Develop a questionnaire for this purpose – and ensure that it is used
7. Use of agreed learning tools	did the trainers do what they said they would?	Guidance notes on use of "active learning" learning are developed – and are used. Trainers required to demonstrate how their course structure and use of learning outcomes will help achieve learning outcomes
8. Training institution	Is it managing its staff and resources in a way which achieves results?	Self-assessment Independent assessment Both require a proforma

These points are further developed in the annex - which contains specimen questionnaires[29]. UNDP and Council of Europe have recently published one of the few papers on this subject[30]

[29] Assessment Tools (EU Tacis Sofia 2008)
[30] Approach to Quality Assurance in Training for Local Governance (Council of Europe and UNDP 2006)

14. Where does this paper take us?

At this point, a summary of the key points normally appears – on the principle of the good training adage –

- "Tell them what you are going to say (the Executive summary at section one)
- Say it (sections 2-11)
- Summarise what you have said"!

But I'm not ready yet. There is, hopefully, a simpler message contained in all these words. Someone once said – "inside every fat man, there is a thin one struggling to get out"! Your feedback on this paper will help that thin man's release!

Ronald G Young; 7 June 2011 Sofia

Further Reading
Training for Local Government in Central and Eastern Europe by Daniel Serban (Local Government and Public Services Initiative 2002) http://lgi.osi.hu/publications/2002/113/Serban.pdf
A very rare, clear statement about principles, practise and pitfalls. One of the few I can recommend.

Global Human Resource Management – managing people in developing and transition countries; Willie McCourt and Derek Eldridge (Edward Elgar 2003)

Training and Beyond; seeking better practices for capacity development by Jenny Pearson
http://www.oecd-ilibrary.org/development/training-and-beyond-seeking-better-practices-for-capacity-development_5kgf1nsnj8tf-en;jsessionid=4ld21rkgpd5gq.delta

the Learning Network on Capacity development http://www.lencd.org/

CONTENTS SHEET

1. The argument
- The key questions
- Some basic principles

2. What should we assess?
- The 4 Kirkpatrick factors
- 8 possible factors
- Developing the standards – the importance of Guidelines and one example

3. Who should do the assessing?

4. When should it be done?

5. Some examples of assessment forms for -
- the relevance of the planned course structure and material
- course participants
- training managers assessing courses and trainers
- ensuring relevance after the course

6. Conclusion

July 2008

1. The argument of the paper

1.1 the key questions
This paper is structured around the following questions –
- WHAT precisely should be assessed – and WHY?
- By WHOM?
- HOW can that assessment most realistically be done?
- WHEN is that best carried out?

This paper identifies 10 factors which might be assessed, dismisses two as unrealistic – and looks in detail at how this assessment might be done for the rest.

The emphasis of the paper is on practicality. There are too many complicated systems around which, as a result, are rarely used. Our position can be summarised in four short assertions –
- assessment is important
- people are reluctant to practise it
- it cannot be done without clear written standards and procedures
- but they should be kept simple!

Let's face it – a lot of training is "hit and miss". A course is offered – and specific individuals are told by the boss to attend. How do we really know that this particular subject – packaged (hopefully!) into a particular mix of presentations, discussions, tasks, working groups, case-studies etc ; and led by individuals with a particular mix of knowledge and skills – will actually lead to results? And results, furthermore, at two levels - first for a group of people whom the trainers have never met before; and then for the organisations the course participants belong to?

The only answer is "custom-design" – ie that the course is designed with specific individuals in mind. All too often the focus of course design is simply the subject matter – what do people need to know, for example, to submit a successful bid for resources for a waste management plant? Such a question is, however, only the first question of the design process. Once it has been answered – and a list of "must-knows" and "must-be-able- to do"s has been drawn up, the next question is how much of this will the people attending the course already know and be able to do?
And the only way, it seems, to answer that question is when the learners are actually sitting in front of the trainer.
This, however, is why we have "**learning outcomes**" - developed by the training managers and trainers (a) making explicit their assumptions about the skill or knowledge deficiencies of the learners and (b) then drafting statement about what the participant will know or be able to do at the end of the course. Drafting such a statement has the additional advantage of making those providing the training understand that the course will need to use more than presentations to achieve results[31]

1.2 <u>What</u> can be assessed?
- Methodologies for assessing the performance of **trainers** and the **courses** they conduct are fairly standard - but are too often conducted in a mechanistic way.
- Methodologies for assessing **training institutions** have been developing in Europe in the last decade in very sophisticated ways[32] but require considerable resources and experience to run effectively.
- Systems for assessing the quality of **training material** are generally informal – although an integral part of formal inspections systems.

1.3 When?
Assessment systems are normally used at particular points in the training cycle – for **the initial approval of courses** and then **after a course has been completed**.
This paper argues that assessment is not something to be conducted at discrete points in the training cycle – but *something which should be continuous.* This is very much the approach taken in quality management and quality assurance. The diagram we have developed shows how this might be done in practice.

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[31] From The project's second Discussion Paper - which can be found on www.acquisnet.org
[32] See, for example, the material available on such websites as

1.4 Motivation - Why is assessment important?
At the moment it is seen as a form of retrospective control – did performance meet requirements? And this, perhaps, is the main reason for its mechanistic application. *If, however, assessment is seen as part of a process of forward-looking - and shared - learning by those managing training, it will perform the more important function of improving the quality of training.* Assessment as "control" is a mechanism of power and is the subject of the tactics and games which those subjected to power play. "Assessment as part of a shared learning process" is a journey of exploration by individuals whose curiousity makes them anxious to share their experiences.

1.5 The importance of forms
The paper outlines the various parts of the training system which can be assessed – looks at how exactly the assessment might be done – giving examples of the forms which might be used by training managers.
Such forms are critical. It is not enough for training institutions to have a set of procedures – since this leaves the training manager with the responsibility for developing his or her own forms. This leads to two problems – the forms may be badly designed and they do not carry the authority of the training institution.

1.6 The importance of dialogue
This paper is a draft only and should be used to develop a dialogue with the stakeholders set out in the diagram which can be found in section 9 of the project's Discussion paper.

2. What should we assess? – some choices

2.1 The Kirkpatrick evaluation model
Most workshops will issue a brief questionnaire at the end of the workshop which asks participants such things as –
- were their (generally undefined) expectations were met?
- How useful they found specific sessions or trainers?

That is useful feedback (although participants are often too generous) – but it does not help us assess the contribution the course made to the workplace. It is level one of the four-level model for evaluating training programmes which Donald Kirkpatrick developed in 1959 which is outlined in the table. This is still is the most widely used approach to training evaluation in the corporate, government, and academic worlds.

Box 1; Kirkpatrick 4-level model of training evaluation
Level 1 Reaction: Did participants like it?
Level 2 Learning: Did they learn?
Level 3 Application: Did they apply the new skills or knowledge on the job?
Level 4 Results: Did the change in behaviour positively affect the organization?

Kirkpatrick's model provides a conceptual framework to assist in determining what data should be collected for evaluation purposes. This data collection and evaluation process must be planned as part of the design and development segment of lesson preparation. Otherwise, it is possible to miss an opportunity to collect data which is needed for the evaluation process. The Kirkpatrick approach is therefore a challenging one and not easy to use in its entirety – as our table demonstrates

Table 1; Four Levels of Evaluation of Training based on Donald L. Kirkpatrick's Evaluation Framework

level	evaluation type what is measured	evaluation description and characteristics	examples of evaluation tools and methods	Practicability
1	**Reaction**	**reaction evaluation** is **how the delegates felt** about **the training or learning experience**	eg., feedback forms also verbal reaction, post-training surveys or questionnaires	quick and very easy to obtain not expensive to gather or to analyse
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3	**Behaviour**	**behaviour evaluation** is the extent of **applied learning** back on the job -	observation and interview over time are required to assess change, relevance of change, and sustainability of change	measurement of behaviour change typically requires cooperation and skill of line-managers
4	**results**	**results evaluation** is the **effect on the business or environment** by the trainee	measures are already in place via normal management systems and reporting - the challenge is to identify the trainee's contribution	unrealistic to expect results without extensive training programme of all staff

2.2 A realistic approach

Despite the difficulties of measuring the last 2 dimensions, the Kirkpatrick approach does remind us that workshops – and training material – cannot and should not be treated as ends in themselves. Sadly, that is all too often how they are seen. But courses are means to an end. And that end or objective is the more effective implementation of a new policy (eg a different inspection "regime" or set of procedures). So someone needs to check in advance that a course has been designed in a way which is likely to lead to better organisational performance. The Kirkpatrick approach is a model for post-hoc evaluation. We need ex-ante evaluation as well. And Kirkpatrick also misses some dimensions which might be called "proxy" – eg check of use of agreed learning tools.

The purpose of this paper is to set out and analyse 8 factors which it is realistic for normal training managers – faced as they are with deadlines and small budgets - to assess –

- **Relevance** (is the course material and structure likely to help the individual or organisation perform better?)
- **Participant Learning** (Did the course help the participants develop the understanding or skills the "learning outcomes" said it would?)
- **Training material** (do they reach an agreed standard?)
- **Use of agreed learning tools** (did the trainers do what they said they would?)
- **Participant satisfaction**
- **Performance** (how well did the trainers perform?)
- **Trainer learning** (what did the trainers learn about participant learning needs – and how they could better be met?)
- **Training institutions** (are they managing their staff and resources in a way which achieves results?)

Table two below suggests how each of these might actually measured.

Table 2; an overview of assessment

Factor	Key question	How can it be answered?
1. Course Relevance	is the course material and structure likely to help the individual or organisation perform better?	The context in which the course participant is working is described. Missing knowledge and skills are then defined in a needs assessment; **learning outcomes** required – and a course structure and materials which allow these outcomes to be achieved.
2. Participant Learning	Did the participants develop the understanding or skills the "learning outcomes" said it would?	Test before and after the course OR Ensure that learning outcomes are presented and agreed at the start of the course; and that feedback forms ask about this
3. Training material	Did the handouts meet the required standard?	Standards are drawn up and used
4. Participant satisfaction	Were their expectations met?	They are asked at the beginning of the course what these are – and then asked about it at the end
5. Trainer Performance	how well did the trainers perform?	Ask participants to rate trainers on an agreed scale. Independent assessment
6. <u>Trainer</u> learning	what did the trainers learn about participant learning needs – and how they could better be met?	Develop a questionnaire for this purpose – and ensure that it is used
7. Use of agreed learning tools	did the trainers do what they said they would?	Guidance notes on use of "active learning" learning are developed – and are used. Trainers required to demonstrate how their course structure and use of learning outcomes will help achieve learning outcomes
8. Training institution	Is it managing its staff and resources in a way which achieves results?	Self-assessment Independent assessment Both require a proforma

2.3 Being clear about the what - Developing the Standards

No effective assessment can be carried out without a detailed description of what is expected of the action being assessed. In the absence of such Guidelines, any assessment represents the arbitrary judgment of an individual or committee.

So the first step is to define exactly what the client or training manager expects at each stage. Best put this in the form of steps or checklists – "first do this, then that". Over the page, you will find one example of Guidelines for the development of training modules.
It is just an example. It can be improved!! For example, it doesn't say much about how to assess the needs of participants (the ex-ante assessment). For some guidance on that – go to section 4 of the project's Discussion paper.

2.3.1 DRAFT GUIDELINES DEFINING MODULAR STANDARDS

1. Module Structure
Each training module should contain the following four sections –

- A statement about objectives and learning outcomes.
- A course syllabus
- A course structure
- Learning support material

1.2 **Objectives and learning outcomes**
This section will consist of -

- the course title,
- a detailed description of the target group,
- assumptions about their knowledge and skill gaps
- an indication of how these assumptions might be further clarified before and during the course;
- learning outcomes

1.2 **Course Syllabus;** an outline of the planned content and the duration of the course (no of hours allocated)

1.3 A **course *teaching* structure;** which describes the mix of learning tools (see section 6 of Discussion paper 2) which will be used –

- lecture
- case-study
- working groups
- etc.

This should include an illustrative timetable for each day

1.4 learning support material – which will be a list of the titles of all material which will be issued to participants during – or at the end of the workshop. The most important of these is the original material **which will be prepared by the course developer.** Two points are emphasised -

- The course developer should present to the training coordinator an initial structure for that material. Attached as an Annex is one example which could be used as a template.
- The course developer should list the source and reference materials which will be drawn upon in drafting - and make suggestions for further reading.

2. Agreement of structure of module
Each course developer will present a draft structure of the relevant module for discussion and agreement with the training coordinator. This should cover the four elements laid out in the previous paragraph. The draft structure will then be discussed with and approved by the project.

3. Drafting of commissioned material

3.1 User friendly
It should be "user-friendly" eg

- Be logically structured and clearly written
- contain frequent **self-assessment tests** to allow the reader to check how much of the material they have really understood
- include **exercises (case-studies)** to allow the reader to apply what they are learning

Each course developer will keep in close touch with the training coordinator to produce a first draft of the agreed material

3.2 learning from doing
Work like this is not done in isolation at a desk. It needs to get feedback – and the best feedback is in the workshop itself. You'll find out as you present it what gaps exist – what sections need further work. We'll set up a feedback mechanism which will allow us jointly to agree the detail of the further work needed on the material.

3.3 Milestones
There will be a written agreement which will include all the above points. The coordinator will draft this. It will include -

- Date for discussion of initial draft
- Date of relevant workshops
- The structure of feedback.

3.4 Template
The course developer will produce training materials in electronic version using the template provided.

4. Final Assessment Procedure

4.1 appointment of assessor
An assessor may be appointed – to offer independent advice on whether the course material covers the agreed structure and has the necessary coverage and quality.

4.2 Quality
A brief proforma will be used for the evaluation of the modules – consisting of key questions against on the basis of which the module will be scored. The Training Coordinator will then use that in making his assessment of the final module and forward a report on that - and the module - to the assessor.

4.3 Recommendation
The assessor will review the module and make a recommendation – clearly justifying any recommendation different from that of the coordinator - to the training manager. The manager will then make his own decision on the matter – again recording clearly the reasons for the decision.

4.4 Appeal
In any negative cases, an appeal may be made to ???

2.3.2 Draft Guidelines for writing "Learning Outcomes"

These are developed by the training managers and trainers (a) making explicit their assumptions about the skill or knowledge deficiencies of the learners and (b) then drafting statement about what the participant will know or be able to do at the end of the course. The absence of such guidelines makes the assessment task an arbitrary one. Noone really knows what is being assessed!
Guidelines on how to draft useable learning outcomes are attached (?). Learning outcomes immediately indicate how participants (and the course) can be because they state what observable and measurable behaviours the participants should be demonstrating. Learning outcomes should be written **from the participant's point of view, not the trainer**! The emphasis should not be on what you want to cover but on what you want the participant to value, understand, or do with the subject, information, or skills after the training program is over

2.3.3 Draft Guidelines for course design selecting appropriate learning tools

See section six of Discussion paper 2

3. Who should be assessing?

At least four[33] different groups are involved in any training –

- The **client** – who commissions the training
- The **training manager** – based in the training centre: who helps define the learning outcomes; ensures the course structure is designed to meet these; selects and briefs the instructors; and gets the participants to the agreed location.
- The **instructor** (trainer) – who prepares and delivers the training material
- The **learners** – who should have some sort of control over the course structure and their learning process[34]

Each can and does have a view on how well the training went – and whether it achieved its objectives (however clearly or openly expressed). Table 3 maps the different assessment systems which can be developed – depending on who assesses what. Different stakeholders or groups (Who?) are identified in the columns rows[35]; and the assessment factors (the what?) listed in the rows.

Table 3; Assessment systems

What is being assessed? By whom?	**Client**	**Training manager or centre**	**Trainer/instructor**	**Participant**
Planned Learning outcomes			Example at 5.1.1 below	
Training material		Example at 5.1.2 below		See 5.2.2
Actual Learning				This requires testing
Use of agreed learning tools		X		
Trainer Performance		5.3.1	Self-assessment (5.2.1)	Feedback
Satisfaction		5.3.2	5.2.2	feedback forms (5.2.3)

Those who have the responsibility for running courses have two natural inclinations - they want to show that the training achieved its objectives; and they want to minimise any critical discussions with trainers about poor performance. The easiest way to achieve these twin objectives is for them to give participants a short questionnaire which does not go into the specifics of each session or trainer.

The examples we have given try to avoid that failing – and are designed for training managers and trainers who actually want to improve their performance and help achieve a quality training system.

[33] With E-learning we add a fifth – the provider of the technical infrastructure.
[34] Since they are adults
[35] The gaps in some columns indicate that no example has at this stage been found for inclusion in the paper.

4. When should these assessments be carried out? And what are they for?

These two questions are tightly linked together. Assessment systems are normally used at particular points in the training cycle – for **the initial approval of courses** and then **after a course has been completed**.

My view is that assessment is not something to be conducted at discrete points in the training cycle – but *something which should be continuous*. The diagram set out on page 16 above emphasises the importance of training managers and trainers commiting themselves to "continuous learning" – and treating every workshop as an opportunity of improving their understanding of needs and refining their learning tools and skills.
This is very much the approach taken in quality management and quality assurance[36].

The diagram at page 16 of this booklet looks at each of the four roles and tries to define two things –

- what each person needs to bring to the process if training is to be effective and
- the results (or outputs) which should come from the dialogue which is needed between each group as we move through the training cycle. Learning outcomes, for example, come from a proper discussion between the client and training manager to which the latter brings questioning and analytical skills to make sure that the learning outcomes are defined in a relevant and measurable manner.

[36] The Oxford English Dictionary defines Quality Assurance as "the maintenance of a desired level of quality in a service or a manufactured product, especially by means of attention to every stage of the process of delivery".

5. The HOW – suggestions and examples

5.1 Designing the course structure and material (covering first 3 elements of table 2)

This is the most difficult part – and yet the most important. Technically it requires the system in which the course participants are working to be described and the body of knowledge and skills required for that to be identified. Then missing knowledge and skills are listed in a needs assessment; from that "**learning outcomes"** are defined ie a statement of what the course participants will have learned by the end of the course.
The course structure and materials are then developed which allow these outcomes to be achieved.
In reality, all this can be done only when time and experienced consultants are available – and this happens only when a major organisational change is being undertaken.

The first page of this paper sets out the situation which faces training managers in reality – someone tells them to organise a course in a few weeks – and little is known about the participants. The project Discussion Paper suggested that trainers should -

- Contact some or all course participants before the course and invite them to articulate some of the questions and issues they want the course to help them with
- Ensure that the workshop starts with a properly organised session which can help identify the key issues or questions the participants want the course to deal with (casual questions about "expectation" rarely work)
- Adjust the course structure accordingly
- Treat each workshop as an opportunity to refine your understanding of needs and adjust the programmes and use of tools accordingly
- Test the knowledge of participants before and after the course (see section 8 below)

Of course all of this will be done only by trainers with a commitment to that style of working. When the trainer is a subject specialist with a full-time job in state administration, it will not be easy to do. And training managers are normally reluctant to insist that the trainers operate in such a way. The roles of the training manager and of the trainer - and the relationship between them - is a crucial issue we deal with in section 9 of the project's Discussion Paper.

5.1.1 Checklist for trainer - Instructional Design Process

A. Analysis

1. Who are your participants?
Find out: who your audience is; what they already know; what are their learning characteristics; what they need or want to learn; why they need it; and in what environment will they apply the learning.

2. What are you trying to achieve with your instruction?
Define the need for, and the general aim or purpose of, the course/subject/lecture. This is the overall goal or rationale for the course.

3. What knowledge, skills and attitudes need to be taught?
Determine what must be taught in order to satisfy the participants' needs.

4. How much content do you need in your instruction?
Set the scope of the content to be covered in terms of time required, number of sessions and topic areas.

B. Design and Development

1. What are your objectives?
The needs analysis should have identified general learning areas which must be defined in terms of specific measurable objectives or learning outcomes

2. What skills, knowledge and attitudes are you trying to develop?
This will be determined by your objectives and will provide the framework for the content. Higher-level skills and knowledge should be identified wherever possible so that understanding and problem-solving abilities are developed in participants.

3. What resources and strategies will you use in your instruction?
Teaching resources and activities should be chosen to complement the learning outcomes.

4. How will you structure the content of your learning material?
Sequencing, presentation, and reinforcement of the content will rely on grouping of related objectives and activities.

5. How will you assess the participants' understanding and whether or not they have met the objectives of the instruction?
Assessment methods must also be matched to the learning objectives so that there is agreement between what the intended outcomes are and what is being measured by the assessment.

C. Implementation
Implementation may involve teaching participants how to make the best use of interactive learning materials, presenting classroom instruction, coordinating and managing a distance-learning program or teaching participants how to make the best use of interactive learning materials,.

D. Evaluation
Evaluation by both teachers and participants can provide the basis for improvement and development of the instruction. It is even better if somebody else sits in on a lecture and prepares detailed notes about the presentation, content and structure. Videotaping is also a good method for evaluating face-to-face teaching.

5.1.2 **EXAMPLE OF INDEPENDENT ASSESSMENT OF DRAFT MODULE**

Training Module Title: ....

Reviewer Contact Information

Name	Email address	Phone number

Instructions to the Reviewer: Please review the following items and fill out the checklist:

Reviewer's Assessment of Materials

	Criteria checked	Materials Meet Criteria	Materials do not meet criteria
Compliant with Module Design Template			
Targets appropriate audience			
Objectives clearly stated			
Organization clear			
Conceptually clear			
Step-by step instructions clear (if applicable)			
Appropriate examples included			
Clarity of detail			
Presentation of content			
Spelling, grammar and punctuation comply with standard conventions			

Summary from Reviewer:

Highlights:

Required changes:

General Comments:

Approval Status (encircle appropriate)**:**

Accepted

Accepted with minor revisions (not required to resubmit)

Revisions required, correct and resubmit for review

5.2 Course Assessment

5.2.1 By trainer himself

Just as it is important for trainers to evaluate participants in the learning process, encouraging self-assessment by trainers helps achieve and maintain top performance. Two checklists are included here to (a) help them get daily feedback and (b) evaluate their training practices by identifying strengths and weaknesses

5.2.2 By participants

Most of the specimen forms we attach in this section are for the course participants to complete. Section 5.3.1 suggests a form which the training manager could use or give to an independent assessor.

5.2.1 Evaluation Feedback Form for trainer

It's important for trainers to get useful feedback from their learners. Getting their reaction to the first day of training helps you alter the pace of information if needed, or if it is a single-day training session, make adjustments for the next group. This job aid is a sample daily feedback questionnaire; hand it out to your learners as-is or customize it to meet your specific needs.

Instructions

Daily Feedback Form

Here is a sample daily feedback questionnaire you can customize for your specific training class.

1. What issues presented today still remain confused or unclear?

____
____
____
____
____
____

2. The most useful topics presented today were:

____
____
____
____
____
____

3. It would help me if you would:

____
____
____
____
____
____

4. The pacing of the program is:

□ Just right.
□ Too slow.
□ Too fast.

Comment:____

5. The degree of participant involvement is:

□ Just right.
□ Too slow.
□ Too fast.

6. Three very important items you should cover tomorrow are:

A. ____

B. ____

C. ____

7. Comments

____

____ Trainer’s Self-Assessment Checklist

Just as it is important for trainers to evaluate participants in the learning process, encouraging self-assessment by trainers helps achieve and maintain top performance. Two checklists are included here to (a) help them get daily feedback and (b) evaluate their training practices by identifying strengths and weaknesses

For any item checked “No,” ask yourself “why?” What was keeping you from completing this, and what can you do next time to make sure it getsdone?

	Y	N
Did you prepare everything?	☐	☐
Did you make the objective clear?	☐	☐
Did you make the session participatory?	☐	☐
Did you tell your learners the agenda at the outset and did you stick to it?	☐	☐
Did you encourage questions?	☐	☐
Did you avoid antagonizing, losing patience with, or embarrassing participants?	☐	☐
Did you have an opening and a closing?	☐	☐
Did you gear the session toward learners’ needs?	☐	☐
Did you promote networking among participants?	☐	☐
Did you use visuals and varied learning techniques?	☐	☐

	Y	N
Did you survey the facility in advance?	□	□
Did you dress professionally?	□	□
Did you market your training program internally?	□	□
Did you evaluate learners' performance?	□	□
Did you start on time?	□	□
Did you admit it when you didn't know the answer to a question?	□	□
Did you move around the room?	□	□
Did you keep discussions on track?	□	□
Did you avoid your quirks?	□	□
Did you give learners just the right amount of information?	□	□
Did you focus on the end, not the means?	□	□
Did you vary your method of delivery?	□	□
Did you stay interested in the material?	□	□
Did you structure your role appropriately for the situation?	□	□
Did you position yourself as an essential asset to the company?	□	□
Did you remain calm?		

5.2.2 End-of-Training Programme Validation Forms

Assessment of Learning Questionnaire (LQ)
Please consider the learning programme that you have attended and complete the following. Be completely honest in your assessments and answer the questions as fully as possible, continuing on a separate sheet if necessary. You will find your reflections helpful in the completion of your Action Plan.

LQ Part I - Learning
To what extent do you feel you have learned from the programme? (Please ring the score number that you feel most closely represents your views)

Learned a lot 5 4 3 2 1 *Learned nothing*

If you have rated 6, 5 or 4 please describe a) what you have learned and b) what you intend to do with this learning on your return to work.

If you have rated 3, 2 or 1, please state as fully as possible the reasons why you gave this rating.

LQ Part II - Confirmation of Learning
To what extent do you feel you have had previous learning (perhaps some you have forgotten) confirmed?

Confirmed a lot 5 4 3 2 1 *Confirmed little*

If you have rated 6, 5 or 4, please describe a) what has been confirmed and b) what you intend to do with this learning on your return to work.

If you have rated 3, 2 or 1, please state as fully as possible the reasons why you gave this rating.

LQ Part III - Non-learning

What have you NOT learned that you needed to and /or expected to learn during the programme? Please describe fully any items.

LQ Part IV - Any other comments

5.2.2 Example of Training Programme Content Evaluation Form

1) What did you like *best* about the programme?

2) What did you like *least* about the programme?

3) What did you learn from the programme?

4) What did you not learn from the programme that you were expecting to learn?

5) What do you think should be added to the programme?

6) What do you think should be dropped from the programme?

7) To what extent did the programme duplicate what you had learned previously?

8) What are your views on the handouts issued?

Excellent quality	5	4	3	2	1	*Poor Quality*

Too many □	**Just right □**	**Too few □**
Very relevant □	**Satisfactory □**	**Not at all relevant □**

9) What are your views on the visual aids used?

OHP/PowerPoint Slides:

Excellent quality	5	4	3	2	1	*Poor Quality*

Too many □	**Just right □**	**Too few □**

Well used	5	4	3	2	1	*Badly Used*

Flipchart:

Excellent quality	5	4	3	2	1	*Poor Quality*

Too many □	**Just right □**	**Too few □**

Well used	5	4	3	2	1	*Badly Used*

Example of **Balance of Training Programme Evaluation Sheet**

1) How do you rate the balance between input sessions, lectures, activities, discussions, and videos?

Good Balance	5	4	3	2	1	*Poor Balance*

Why do you give this rating?

2) How did you feel about the length of the programme?

Too short	*Just right*	*Too long*

3) To what extent was the programme logically sequenced?

Well sequenced	5	4	3	2	1	*Poorly Balanced*

In what way?

4) How effective were the practical activities?

Very effective	5	4	3	2	1	*Ineffective*

Why do you give this rating?

5) What was the level of time given for (a) the activities and (b) the follow-up discussion?

(a) Sufficient	5	4	3	2	1	*Insufficient*
(b) Sufficient	5	4	3	2	1	*Insufficient*

6) What level of time would you like to have seen?

How knowledgeable and/or experienced are you in the techniques and approaches of training?

Very	5	4	3	2	1	*Not at all*

5.2.3 Example of Trainer Evaluation Form (to be completed by participant)

Please rate each trainer by placing his/her initials under the relevant score and for each aspect.

Aspect	Very effective	Good	Not very effective	Not effective
Knowledge of subject	4	3	2	1
Organization of sessions	4	3	2	1
Obvious preparation	4	3	2	1
Style and delivery	4	3	2	1
Responsiveness to group	4	3	2	1
Producing a good learning climate	4	3	2	1

Any other comments:

5.3 Assessment by training manager

Training managers often lack the time and confidence to monitor course structure and materials and trainer performance. Too often, too much, is left to the instructors – who, as subject specialists, are assumed to have the knowledge and skills to package their knowledge in a way which leads to effective learning. But being a subject specialist and being a trainer are two entirely different things! Instructors should not be left free to design their own course feedback forms!

How can training managers play a stronger role? One obvious answer is for the Training body to have a set of guidelines and forms which sets out a set of procedures and roles – and which the various people involved in training are obliged to follow.

5.3.1 Assessing the course

One simple example is attached. More detailed forms have already been given at 5.2.2

5.3.2 Assessing the trainer

There are lots of views about what makes a good trainer – box 1 is a typical list –

Box 1; Profile of a good trainer

- Well prepared sessions - and resources
- Variety of teaching methods used
- Good relationship with the trainees
- Interested in the needs of individual trainees
- Easy to understand
- Knowledgeable about the subject
- Makes students feel enthusiastic
- Create a good learning atmosphere
- Friendly and enthusiastic
- Uses appropriate language/humour
- Supportive
- Respectful of individuals
- Experienced
- Gives praise and highlights success rather than failure

That's quite a demanding list! Sections 5.2.3 and 5.3.2 contain forms to allow training managers to assess the performance of a trainer – using some of these qualities.

Sometime, of course, a training manager feels so grateful that he has found a trainer willing and able to deliver training that (s)he doesn't want to lose that person by subjecting them to critical feedback! But, we repeat, an experienced and knowledgeable subject specialist does not become a good trainer overnight! It may be better to take someone who is less knowledgeable – but is a more open person and has the above-mentioned qualities. A good trainer is someone who is constantly learning and – as we said in section 4 - treats every workshop as an opportunity of improving their understanding of needs and refining their learning tools and skills. Box 2 is another way of putting this[37].

[37] With thanks to "Training for Dummies"

Box 2; From good to great Trainers

Good Trainers……	**Great Trainers also…..**
deliver training that addresses all learning styles	Spend time with individuals to ensure that each participant's learning needs are met
Know their content well	Constantly update and improve contents – based on organisational and industry needs
Have excellent presentation skills	Seek opportunities for feedback; practice to fine-tune
Are flexible when difficult situations arise	Have back-up plans and options ready
Are enthusiastic about the training topic	Inspire participants
Are informed about recent developments in their field	Become experts and contribute to the field by writing articles
Ensure that participants learn	Ensure that knowledge applies to the job; follow up after training

5.3.1 Checklist to be completed by independent assessor on overall impression of the training

	Yes	No	**Evidence**	**Action Required**
Learning objectives clearly stated and followed				
The teaching and learning approaches varied and interesting				
The key teaching points stressed				
Generally Content-Oriented Delivery				
Generally Learner-Centered Delivery				
Case studies presented				
Case studies used for group exercises				
Group exercises				
Individual assignments				
Group Discussions				
Plenary Sessions				
Brainstorming Sessions				
Questions and Answers Sessions				
Icebreakers				
Handouts				

5.3.2 Draft Feedback Form on Trainers' Performance (for completion by independent)

Trainer's Name:

Put a tick in the box which best describes your own impression of particular individual trainer:

AVERAGE

Full of ideas				Conservative
Encouraging participants' activities				Discouraging participants' activities
Thorough				Careless
Logical				Illogical
Focused on participants' needs				Disregarding participants' needs
Patient				Impatient
Helpful				Unhelpful
Tolerant				Intolerant
Applying Visual/Other Learning Aids				No use of Learning Aids
Clear				Confusing
Knowledgeable				Badly informed
Enthusiastic				Passive
Fair				Unfair
Cautious				Impulsive
Easy going				Strict
Relaxed				Tense
Modest				Arrogant
Friendly				Unfriendly
Attentive				Inattentive

Comments:

5.4 Building on the workshop - **The Action Plan**

It is essential that at the end of every learning event, all participants should complete an action plan based on what has been learned or has been reminded. When learning is applied when the trainee returns to work, the new skills and knowledge develop, reinforce their new abilities, and the organization benefits from improved performance. Learning without meaningful follow-up and application is largely forgotten and wasted.

Learners should be guided to produce action plans that:

- are simple and straightforward
- are clear and unambiguous
- contain items that can be implemented by the learner at work, with or without support
- or any resources that might be available
- contain comments on the methods to be used; the resource required and the timings: start, finish times or dates, for all the action items (use 'SMART' - Specific, Measurable, Agreed, Realistic, Time-bound)

Finally, action plans should be achievable in the context of work demands. Action plans should not contain more items than the learner can handle without undue delay or creating problems at work. If the action list appears to be too complex or long, items should be scheduled for progressive introduction, when prior items have been completed.

Personal Action Plan

	action plan item	how to implement	when
1.			
2.			
3.			
4.			
5.			
6.			

(Continue on a separate sheet if necessary)

Action Plan Implementation Aid
Complete this sheet for each item included on the action plan:

1. What is the item of learning you intend to implement?

2. By which targets will you measure progress?

3. What barriers might impede your implementation?

4. How will you avoid or negate these barriers?

5. **Time**: when do you intend to start implementing the item?

6. **Time**: by when do you intend to complete the implementation of the item?

7. **Resources**: what resources (people, equipment, extra skills, etc.) will you need to complete the implementation of the item?

8. **Benefits**: what benefits do you hope will result from your actions (including financials if possible to assess)?

9. **Commitment**: when will you and your manager meet a) to discuss the implementation of your plan and b) to review the progress of this action?

10. Any other comments (continue on a separate sheet if necessary):

6. Conclusion

The purpose of this paper is to provoke discussion about how the different aspects of a training system might most realistically be assessed – by the different groups involved in a training event or system.

The approach has been -

- To ask basic questions about **who** can measure **what**, **when** and **why**
- To explore **how** that can be done in ways which are (a) easy to do and (b) contribute to the improvement of training.
- To present **examples of good practice** at the simplest level – eg of checklists and questionnaires
- To encourage the reader to select and develop the forms which are most useful for their purposes

One aspect of assessment is not included – of the effectiveness with which training centres use their scarce resources of time, money and staff.

Complex systems of assessing and accrediting training bodies do exist - but perhaps the best measure of the value of a training body is whether the courses it runs and the trainers it uses satisfy the criteria set out in this paper.

About the author
Ronald Young lived for his first few decades in Scotland – working for 22 years as an aspiring academic and innovative politician in local then Regional Government. The last 20 years have been spent as a consultant in central Europe and central Asia. He confesses to great difficulty in answering the simple question "What do you do?"
"Student" was easy but, after graduation, I had a quick succession of jobs in what could be called generally the "planning" field - and "planner" is as vague a term as "manager" and enjoyed a rather limited vogue. In 1968 I joined a polytechnic and was also elected to a town council – so "lecturer" was as good a description as what I did as any. Using my voice was what I was paid for – whether to transmit information or opinions. I read widely – so "reader" was also a pertinent word. I became heavily involved in community development – managing to straddle the worlds of community action and political bureaucracy (for 20 years I was the Secretary of ruling Labour groups in municipal and regional Councils and also a sponsor of community action) and figured in a book about "reticulists" (networkers) – but imagine putting that word in a passport application!
For a few years I was Director of a so-called "Research Unit" which was more like a Think Tank in its proselytising workshops and publications celebrating the new rationalism of corporate management and community development. At age 43 my default activity became full-time (regional) politics – with a leader role but of a rather maverick nature who never aspired to the top job but was content to operate at the interstices of bureaucracy, politics and academia.
All this paved the way for the "consultancy" which I have apparently practised for the past 20 years in Central Europe and Central Asia. But "consultant" is not only a vague but a (rightly) increasingly insulting term – so I was tempted for a period to enter the word "writer" on my Visa forms since this was as good a description of what I actually did as any. Except that this was seen by many border guards in central Asia as a threatening activity! Robert Reich's "symbolic analyst" briefly tempted – but was perhaps too close to the term "spy"!

In 2008 he started a website http://www.freewebs.com/publicadminreform/ which contains the major papers he has written over the years about his involvement with reform efforts of various public organisations.

"Most of the writing in my field is done by academics - and gives little help to individuals who are struggling to survive in or change public bureaucracies. Or else it is propoganda drafted by consultants and officials trying to talk up their reforms. And most of it covers work at a national level - whereas most of the worthwhile effort is at a more local level.
The restless search for the new dishonours the work we have done in the past.

*As Zeldin once said - "To have a new vision of the future it is first necessary to have new vision of the past***"**

In 2009 he started a blog www.nomadron.blogspot.com to try to make sense of the organisational endeavours he has been involved in - to see if there are any lessons which can be passed on. To restore a bit of institutional memory and social history - particularly in the endeavour of what used to be known as "social justice".

"My generation believed that political activity could improve things - that belief is now dead and that cynicism threatens us all."

Some of the papers which can be read on Ronald Young' s website http://www.freewebs.com/publicadminreform

Building Municipal Capacity; an interesting account of an intellectual journey

Just Words? a glossary and bibliography for the fight against the pretensions and perversities of power

Flesh and Blood - the EC's Backbone strategy meets Impervious power; in which I critique the ongoing EC attempt to improve its Technical Cooperation work - at least in the area of administrative reform in non-accession countries - and suggest that we don't (any of us) have much of a clue about how to make government work for people in most ex-communist countries

Learning from Experience – the role of training in developing European norms; the final paper left for a project which contains a lot of practical tips

In Transit - Part One The first section of the book I wrote a decade ago for young Central European reformers. I find it stands up pretty well to the test of time

The Management of Government; A very thoughtful 2000 piece by management guru Mintzberg

Chinese administrative Reform in perspective; a 2011 briefing; written for anyone involved in discussions about Chinese PAR; giving 12 ways their system impacted on me; challenging the way we normally portray Western systems; and giving a lot of reading recommendations - all based on my brief involvement as Team Leader for a major project of EC Technical Assistance.

Democracy, Bernard, it must be stopped! Not one of my papers but some "tongue in cheek" advice from the retiring Sir Humphrey (of "Yes Minister") to the young colleague who inherits his position. Quite brilliant! By Anthony Jay

Overview of PAR in transition countries This is the paper I drafted for the European Agency for Reconstruction after the staff retreat which I was invited to speak at in June 2006. The best papers are always written after the event!

Annotated Bibliography for change agents For quite a few years I had the habit of keeping notes on the books I was reading. Perhaps they will be useful to others?

Lost in the logframe; a powerful critique by Lucy Earle of the project management system which governs all technical assistance project these days and which kills creativity and joy.

Roadmap for Local Government in Kyrgyzstan; this is a long doc (117 pages). I enjoyed pulling out this metaphor - and developing and using (in workshops) the diagram at pages 76-77

Transfer of Functions - European experiences 1970-2000 I learned a lot as I drafted this paper for my Uzbek colleagues. I haven't seen this sort of typology before..

http://www.freewebs.com/publicadminreform/

“teach me, I will forget,
show me, I will remember,
involve me, I will understand”

Chinese proverb