THE ALLIANCE
FOR CHILD PROTECTION
IN HUMANITARIAN ACTION

Learning and Development Toolkit

The Alliance for Child Protection in Humanitarian Action (the Alliance) supports the efforts of humanitarian actors to achieve high-quality and effective child protection interventions in humanitarian settings. Through its technical Working Groups and Task Forces, the Alliance develops inter-agency operational standards and provides technical guidance to support protection of children in humanitarian settings. For more information on the Alliance's work and joining the network, please visit https://www.alliancecpha.org or contact us directly: info@alliancecpha.org.

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Acronym list

CF	Competency Framework
CGA	Capacity Gaps Analysis
CP	Child Protection
CPHA	Child Protection in Humanitarian Action
L&D	Learning and Development
LNA	Learning Needs Assessment
SMART	Specific, Measurable, Achievable, Relevant, Time-bound
SME	Subject Matter Expert
ToR	Terms of Reference
WG/TF	Working Group / Task Force

About the toolkit

Who is the toolkit for?

The toolkit has primarily been developed for Child Protection in Humanitarian Action practitioners who are involved in designing and delivering capacity building activities, but who are not learning and development experts by background. The nature of the guidance and tools contained in the toolkit means that many will be applicable to those working in other technical areas, and colleagues in other sectors are welcome to make use of the toolkit.

How do I use the toolkit?

The toolkit is intended to be used alongside your own work, as a source of easily digestible learning and development guidance, as well as associated templates and tools. We recommend consulting the relevant sections of the toolkit before embarking on the associated activities, for example, reading the Identifying Learning Needs section before starting work on a capacity gaps and strengths analysis.

Editable versions of tools and checklists are available here.

What's in the toolkit?

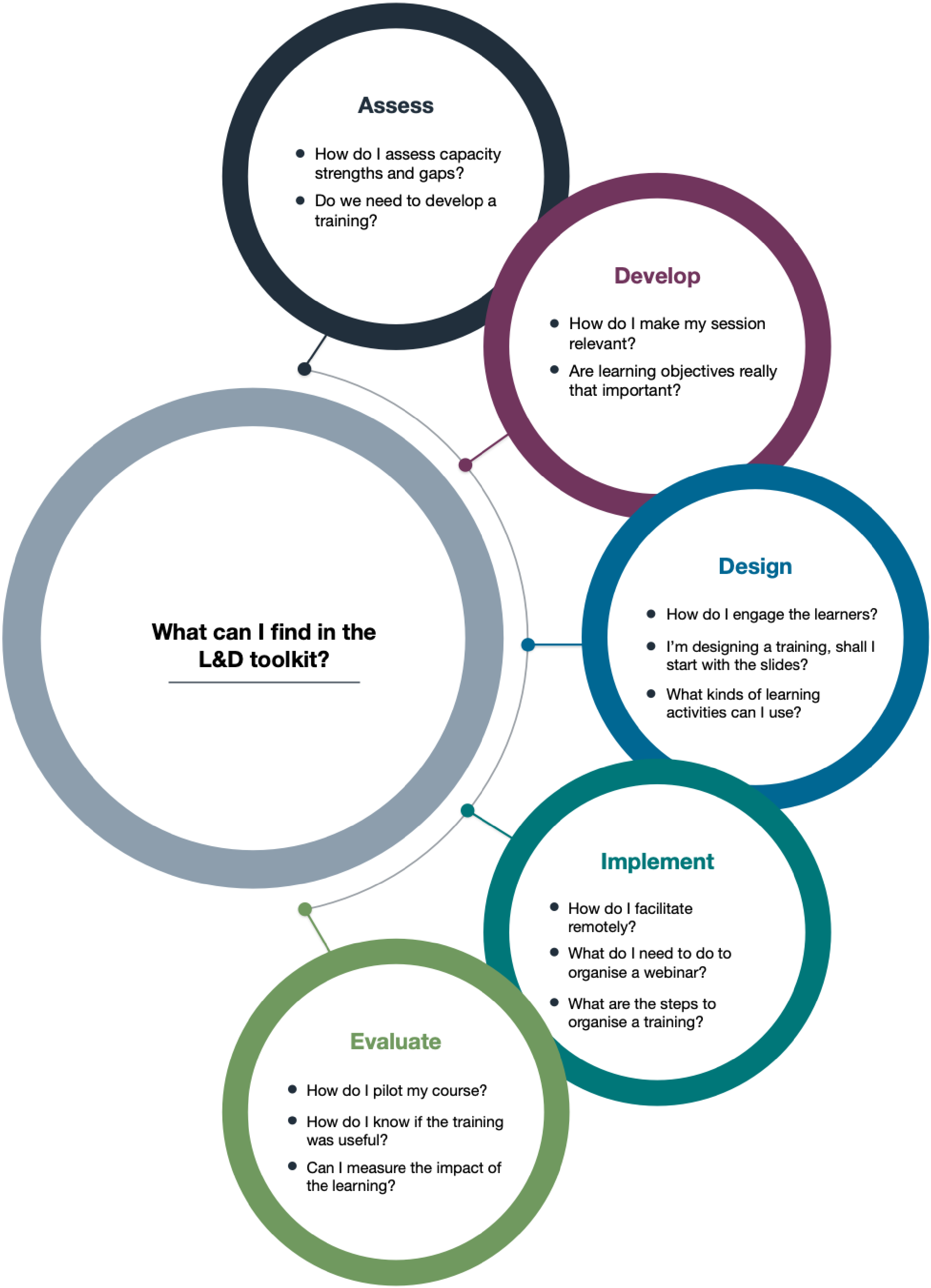
For a quick overview of what you can find in this toolkit, use the graphic on page 4 or the contents list on page 5.

How did you decide what to include?

The toolkit aims to provide support with key steps in the learning process which are commonly carried out by technical and programme staff. Guidance on more complex learning and development activities or processes is not included. This is because we recommend involving an L&D colleague or focal point directly when considering or implementing such activities. Examples include: setting up mentoring, coaching or action learning schemes; developing competency frameworks; writing simulation exercises; transforming knowledge products into learning and development products.

Where can I get more support?

If you are a child protection in humanitarian action practitioner and your question is not answered by the guidance and tools provided, or if you require further advice on designing your learning intervention, please contact the Alliance for Child Protection in Humanitarian Action Learning and Development Working Group on learning@alliancecpha.org


Assess
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L&D Glossary

General terms

Learning and development: Refers to the process of identifying and meeting the learning needs of individuals, in order to develop their performance in their role(s).

Capacity strengthening, or capacity development: The means by which skills, competence and abilities are created and developed. In learning and development these terms are used to refer to developing the capacity of people, but in other contexts they can also refer to the capacity of an organisation (i.e. material or financial capacity).

Capacity building: Often synonymous with capacity strengthening or capacity development, but this term has received criticism as some believe it contains an assumption that the learner is starting from zero capacity. This term is not recommended for use.

Capacity sharing: The transfer of knowledge, skills and competence, peer-to-peer, between people and organisations, through formal and informal channels.

Competency: A set of skills a person needs to effectively perform in their job, role, or situation.

Learning theory

Pedagogy: Refers to the method and practice of teaching child learners.

Andragogy: Refers to the method and practice of teaching adult learners.

Formal learning: Refers to learning interventions where the aim and objectives are pre-defined, and learners are invited to participate if these objectives suit their needs.

Informal learning: Refers to learning activities where the learner sets their own aims and objectives, and may include self-study, reading, viewing videos, asking questions of colleagues.

Social learning: Refers to learning through others. The basis of social learning is conversations, but this may be formal or informal, online or offline.

On the job learning, or experiential learning: Refers to learning by doing.

Collaborative learning: Refers to learning alongside others in a pair or group setting.

Peer to peer learning: Refers specifically to learning from one another in a pair or group setting.

Learning modalities

Training: A specific approach to learning and development in which a facilitator/facilitators 'teach' participants in order that they can achieve agreed learning objectives. This 'teaching' is done using prepared materials and methodologies and should always be based on andragogy and adult learning principles (thus will differ from methods used to teach children). Usually conducted face-to-face but can be remotely facilitated.

Workshop: A specific approach to learning and development where a group of people come together to work on a specific theme or issue. Usually facilitated, workshops are characterised by the group's direct engagement with the theme which is directly and currently applicable to their work. The learning is therefore something of a by-product of the actions being taken, rather than the purpose of the event itself.

Webinar: A live, online learning event in which participants can obtain new knowledge and insights. Should be concise and invite questions from the learners. Not suitable for the development of skills.

Remote and online learning terms

Remote learning: Occurs when the facilitator and the leaner(s) are separated by distance and cannot meet in person.

Remotely facilitated: Refers to the delivery of 'classroom' sessions without in-person contact, by using online platforms to bring together facilitator(s) and participants at set times, to deliver set sessions.

E-learning, or Online learning: Refers to learning modules or activities which learners can complete on their own, in their own time, using a computer or device.

Blended learning: Traditionally means a learning programme which combines face-to-face elements with e-learning elements.

MOOC: Short for Massive Open Online Course. An open-access, self-paced online course which aims to reach a large audience. As such, the options for interaction are fairly limited.

Bitesize learning, or Micro learning: Content delivered in short, specific bursts. Often refers to online content which is intended to be accessed immediately before the learner will use the information, e.g. short video tutorials on how to use new functions in Excel.

M-learning: Refers to mobile learning, or learning designed and conducted on mobile devices.

Synchronous: Occurring at the same time. Usually refers to components of remote, online or blended learning initiatives which occur at a set time, led by a facilitator.

Asynchronous: Not occurring at the same time. Usually refers to online learning which can be completed at any time.

Self-paced: Refers to learning that can be done at any time, and for any duration, as best suits the learner.

Adult Learning Theory

Introduction

Our learning and development work should be guided by what we know about how adults learn, Andragogy: the method and practice of teaching adult learners, as opposed to Pedagogy: the method and practice of teaching child learners.

In this note we will:

- Introduce key principles of adult learning;
- Outline the key differences between andragogy and pedagogy;
- Describe a key adult learning theory to guide development of your learning materials: Kolb's experiential learning cycle.

Key principles of adult learning

The central premise of andragogy[1] is that it is learner-centred, and adults are self-directed with expectations to make their own decisions. Based on this, andragogy provides five main principles for delivering learning to adults:

1. Adults need to know why they need to learn something
2. Adults need to learn through experience (including making mistakes)
3. Adults approach learning through problem-solving, not through content-consumption
4. Adults learn best when the topic is of immediate relevance and value to them
5. Adults' learning needs to build on their existing knowledge and experience.

In practice, this means that:

- Adults like to be able to question, challenge and evaluate;
- Adults need to integrate new learning with existing knowledge, if they are to keep and use the new learning;

[1] This section developed after the ideas of Malcolm Knowles on andragogy

- Adults bring their own goals, needs and motivations into learning situations;
- Adults have greater existing knowledge than child learners, and this needs to be acknowledged and used in learning situations.

When working with adult learners we should ensure that:

- Goals and objectives are realistic and important to the learners;
- The subject matter is relevant and applicable to their professional lives;
- Material is presented through various methods, including visual supports;
- Activities are well structured and clearly relevant to the topic;
- Learning is experienced-based and comes from doing things;
- Learning builds on existing knowledge and skills and there are opportunities to practise and apply what they have learnt;
- Helpful, considered feedback is provided;
- Time for reflection (including self-evaluation) and breaks are incorporated.

Andragogy vs Pedagogy

It may be useful to consider some of the main differences between adult and child learners. These are shown in this table:

Andragogy	Pedagogy
Learner is intrinsically motivated to learn, to solve problems and improve performance	Learner is largely extrinsically motivated to learn, for example to pass exams, obtain good grades
Learner is self-directed. Facilitator role is to guide the learner to new knowledge/skills	Learner is reliant on the teacher to direct their learning
Learner has substantial life experience and must connect new learning to existing ideas and beliefs	Learner is building a knowledge base and needs help to connect learning to their life experiences
Learner has their own goals and must know why they are engaging in the learning situation	Learner has little or no involvement in defining their learning goals

Kolb's Experiential learning cycle

We recommend using Kolb's Experiential Learning Cycle[2] as the means to incorporate these principles of adult learning into the design of your learning interventions. Kolb's work is based on the notion that a person will learn from experience and discovery, which is central to adult learning theory as seen above.

Kolb's Experiential Learning Cycle has four distinct stages. Effective learning happens when the learner progresses through each stage of the cycle. It is common to start at concrete experience, but actually the learner can enter the cycle at any of the stages.

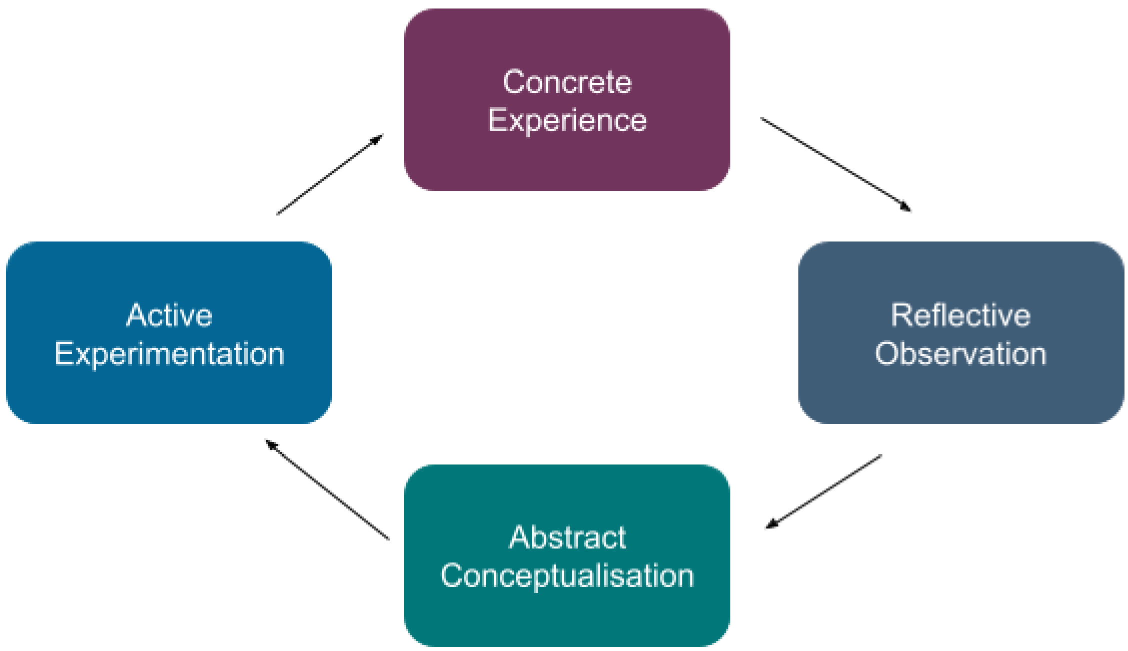


Figure: Kolb's Experiential Learning Cycle

Concrete Experience: This is where the learner does something, or where the experience takes place. At this stage, the learner should be immersed in the experience itself, and may simply note what is happening. In a training context, a case study is often used at this stage.

[2] Original source: David Kolb, (1984), *Experiential Learning: Experience As The Source Of Learning And Development*.

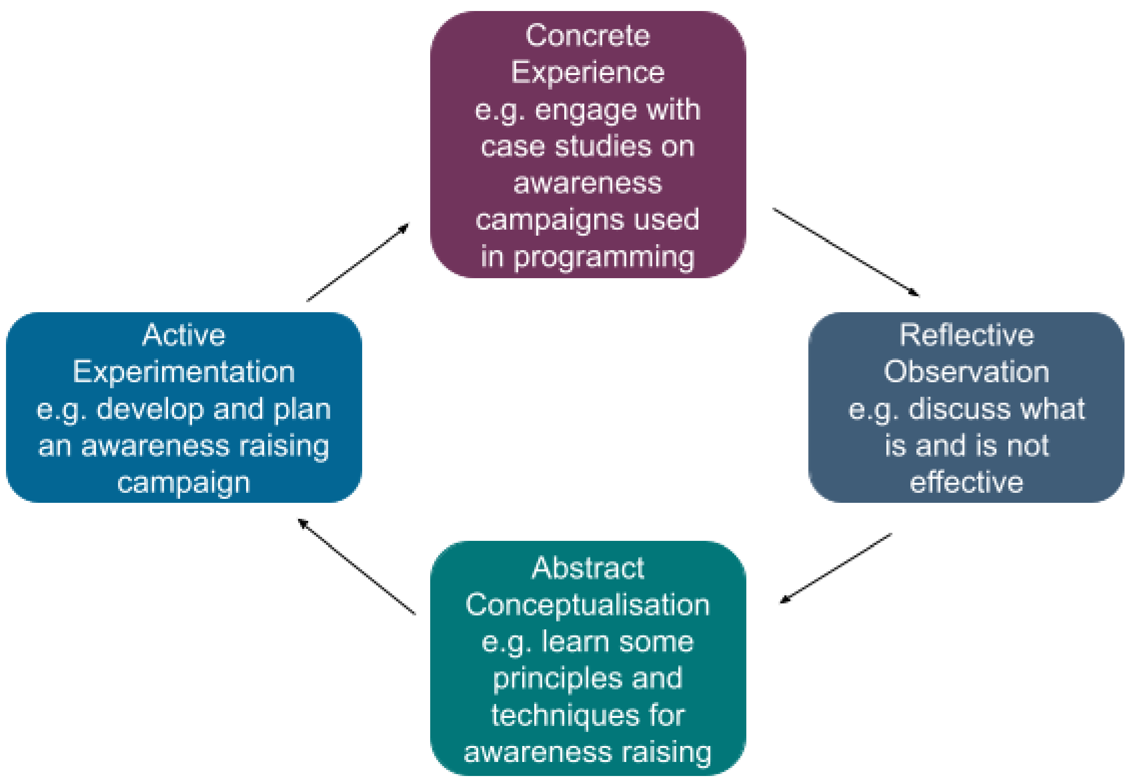
Reflective Observation: This is where the learner takes time to think about what happened. It is common to consider what happened, what was surprising, what went well, what went less well.

Abstract Conceptualisation: This is where the learner starts to make sense of their reflections. This involves identifying patterns, connections and relationships, and thinking about the why. In a training context, this is often where theory is input (by the trainer or through signposting learners to discover this themselves), to support the development of understanding of why things went the way they did.

Active Experimentation: This stage is about the learner considering what they will do differently, based on what they have experienced, observed and learnt in the previous stages, and then putting that into practice. This then creates new learning experiences and so continues the learning cycle.

Example

The following provides an example of how the four stages can be incorporated into a training session on awareness raising.



Identifying learning needs

Introduction

Identifying learning needs is the first step in the learning cycle, and should also be your starting point when designing any learning intervention. It influences all subsequent phases of designing a learning programme. Sometimes called a Capacity Gaps Analysis, and sometimes a Learning Needs Assessment, the key is capturing precise information on the learning which needs to take place. In some cases, you will find a lack of knowledge and skills is not actually the problem - instead it might be a lack of tools, resources or motivation which is resulting in performance or results being below the required standard.

In this note we will:

- Define what a learning need is;
- Outline the basic process of learning needs assessment;
- List potential methods to assess learning needs;
- Outline key questions to be addressed in learning needs assessment;
- Describe how to prepare for capacity sharing approaches in the design of your learning needs assessment;
- Outline how to select appropriate capacity building approaches based on your analysis of learning needs.

Learning needs

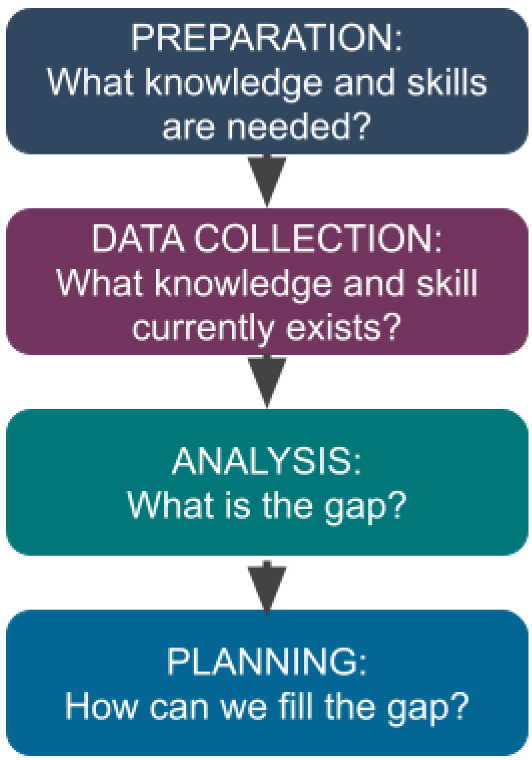
A learning need is the **gap** between existing knowledge, skills and attitudes and the knowledge, skills and attitudes needed to do the job.

The knowledge, skills and attitudes required to do a job are often captured in a competency framework, or in job descriptions. Before you start trying to identify learning needs, you should be clear what the **required** knowledge, skills and attitudes are. This is the first step in a learning needs assessment. The [CPHA Competency Framework] is a good place to start.

So, identifying learning needs is about identifying the gap between the required job behaviours or competencies, and people's current behaviours or competence. This is the gap you are then going to try to fill with your learning intervention.

LNA Process

The following diagram outlines the basic process around learning needs assessment, from identifying the required behaviours, through conducting a learning needs assessment, to developing your capacity building plan based on the data.



You can also watch [this short video](https://www.youtube.com/watch?v=-glpE8kxFPk)[3], which explains a simple needs analysis process.

Data collection methods

Learning needs can be identified through a number of methods, including:

[3] Slade, T. (2018). *How to conduct a needs analysis.* Available at: https://www.youtube.com/watch?v=-glpE8kxFPk

- Survey: Surveys are very commonly used to ask individuals and organisations to identify their own learning needs. A balance must be struck between using closed questions, which can be framed around the expected behaviours and make analysis of the results easier, and open questions which allow respondents to raise additional learning needs which the survey designer may not have thought of, but which can be hard to categorise during the analysis process.

- Observation: Observing people, events, processes and noting any areas where knowledge or behaviours could be improved. This could be through direct observation by the person conducting the assessment, or through feedback from peers, line managers or technical advisors who are familiar with the expected knowledge and behaviours.

- Conversations: Not all learning needs assessments needs to be through a formal process. Discussion with your team, colleagues or partners can identify learning needs. Look out for questions about how to do something, or raise questions to explore what learning needs might exist if and when you notice confusion, mistakes or missing behaviours.

- Interviews: Or formalise your conversations and interview key stakeholders. This is commonly combined with a survey for additional, more detailed insights.

- Testing: Administering quizzes, tests or formal assessments amongst your target audience can identify where knowledge and skills are not in line with the required level. This is a very formal means of identifying learning needs, and may be more appropriate after an initial learning intervention, to find out if additional learning needs remain, or to inform follow-up support activities.

- Performance review: Learning needs are often identified in performance review and supervision conversations. Capturing and analysing this data is a useful, existing resource to inform the design of your learning interventions. You may need to follow up for additional details once you have identified the broad areas which need to be addressed.

- Review existing data: For example, which online courses are most commonly searched or completed? What are technical advisors most commonly asked for support on? What does helpdesk data tell you about inquiries and requests?

- Quality checks: A technical expert can identify learning needs through reviewing the quality and completeness of work which is being done by others, within their area of expertise. You may identify misunderstandings, mistakes, or missing content, which can indicate there is a lack of knowledge or skill. These ideas should be followed up with the use of another method to verify and capture more details on the learning that needs to take place.

We recommend using a combination of these methods to better frame the learning needs you are going to try and address. You may also wish to gather a mixture of primary and secondary, qualitative and quantitative data.

Primary data	Data you collect first hand, or through original research, e.g. by conducting a survey or interview
Secondary data	Data that has previously been collected, e.g. literature review
Quantitative data	Numerical data, e.g. number of training events
Qualitative data	Descriptive data, e.g. how relevant was the training?

Key questions

An effective learning needs assessment will find out about the current situation in the team, organisation or sector, in relation to the knowledge, skills and attitudes needed to perform the required tasks. Example questions to ask in a learning needs assessment therefore include:

Assessment against required knowledge, behaviours and attitudes:

- Please rate your current knowledge level on [insert topic]
- Please rate your current skill level on [insert topic]
- To what extent do you agree with this statement: [insert attitude-based statement]
- To what extent do you [insert behaviour] in your work?
- What would most help to increase the extent to which you [insert behaviour]?
- How confident are you in your ability to [insert behaviour]?
- What would most help to increase your confidence?
- Please indicate your 3 priority areas for improvement [on list of behaviours]
- Please indicate your 3 main areas of strength [on list of behaviours]

NB: this may be a self-assessment by the individuals who need to carry out the role and therefore whose learning needs you are trying to capture. Or, you may be gathering data about those people from other sources. In this case, you can re-frame the questions but seek the same information, for example:

- To what extent do your partner organisations [insert behaviour] in their work?
- Please rate the current knowledge level of your team members on [insert topic]

Prioritisation of topic areas:

- Please rank the following risks in order of urgency
- Please rank the following topics in order of priority for your organisation / context
- Please identify the top three learning needs in your team / organisation / sector

Details of existing learning resources or opportunities:

- Have you previously attended training on [insert topic]?
- How do you currently access support on [insert topic]?
- Which of the following topics can you currently access training on?

Details on preferred approaches to capacity building:

- What are the main challenges preventing your engagement in capacity building opportunities?
- Please rank the following approaches from most to least accessible / engaging?
- What is the ideal duration of a training in your context?

Information on your respondents:

Particularly for surveys and wide-reaching assessments, requesting information on your respondents then helps to assign any learning needs to specific audiences within the wider group. For example:

- Organisation type
- Years of experience
- Role type / technical area
- Country or region
- Gender
- Preferred language

More examples can be found in the LNA Question Bank. From this category of information you can also consider developing learner personas, which can be a useful tool to help you think about the needs, preferences and behaviours of those who may participate in your learning initiatives. You can read more about learner personas and how to develop them here[4].

A note on Capacity Sharing

To lay the groundwork for incorporating capacity sharing approaches into your learning intervention, we recommend also collecting information on **capacity strengths**. From these, you can identify resource persons to input and share experiences in peer-to-peer elements of the learning programme.

To do this:

- Ensure ranking questions allow for positive responses;
- Ask respondents to identify areas of high knowledge, skill or confidence;
- Specifically ask for offers of knowledge or experience to share;
- Seed the idea of peer-to-peer approaches, by asking who they currently do or potentially could learn from in relation to key topics or competencies;
- Let people know you may ask them to input into content or design later.

Selecting your approach

Once you have understood the capacity strengths and gaps and identified some specific learning needs for your target audience(s), it is time to select the most appropriate capacity building approach to meet these needs.

[4] Danielle Wallace for TrainingIndustry.com (2019). Available at: https://trainingindustry.com/articles/content-development/creating-learner-personas-for-learning-success/

We often have in mind that we will need to develop a training session or course, but this cannot be known for sure until the analysis of learning needs has been completed. This flowchart from Cathy Moore[5] is a useful tool to help decide if training is the answer.

You may need to use more than one approach to meet the goal or to blend different approaches together. Or different subsets of your target audience may need to be reached through different, or additional approaches.

Potential approaches include:

- Signposting to existing material
- Information sharing / briefing
- Job aid, e.g. tool or template
- Webinar
- Workshop
- E-learning
- Facilitated training
- Mentoring
- Coaching

See the L&D Glossary for more details on the differences between these approaches, and remember to consider the 70:20:10 model[6] and combine formal, social and experiential learning options.

Developing a Capacity Building Plan

Once you have selected the appropriate approach or approaches, you may want to capture your intentions in a capacity building plan. Information to include in your plan at this stage might include:

- Identified need (e.g. To share lessons learnt on adapting capacity building approaches during Covid-19)
- Target audience (e.g. CP deployable and regional specialists)
- Proposed intervention (e.g. Webinar)
- Priority level (e.g. low/medium/high)
- Budget
- Timeframe

[5] Moore, C. (2017). *Will training help? Flowchart.* Available at: https://blog.cathy-moore.com/2013/05/is-training-really-the-answer-ask-the-flowchart/

[6] See: Arets, J., Jennings, C., and Heijnen, V. (2016), *70:20:10 into Action*.

- Name of lead/person responsible
- Language(s) of delivery
- Existing materials or resources (e.g. existing courses which can be used or adapted)
- Support needed (e.g. e-learning design, webinar technical support).

Learning needs assessment Question bank

The question bank can be found here.

Question	Question type
Based on your experience, what do you consider to be the top three (include risks, approaches or other breakdown for the topics you are investigating) to prioritize for capacity building initiatives? Please rank these in order of importance.	Multiple response
Please rate your current knowledge level on [insert topic]	Multiple choice
Please rate your current skill level on [insert topic]	Multiple choice
To what extent do you agree with this statement: [insert attitude-based statement]	Multiple choice
To what extent do you [insert behaviour] in your work?	Multiple choice
What would most help to increase the extent to which you [insert behaviour]?	Open ended
How confident are you in your ability to [insert behaviour]?	Multiple choice
What would most help to increase your confidence?	Open ended
Please indicate your 3 priority areas for improvement [on list of behaviours]	Ranking
Please indicate your 3 main areas of strength [on list of behaviours]	Ranking
To what extent do your partner organisations [insert behaviour] in their work?	Multiple choice
Please rate the current knowledge level of your team members on [insert topic]	Multiple choice
Please rank the following topics in order of priority for your organisation / context	Ranking
Please identify the top three learning needs in your team / organisation / sector in relation to [insert topic]	Ranking

Capacity Strengths and Gaps Analysis Report

Subheading

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- Availability / opportunities for capacity sharing
- Preferred capacity building approaches
- Access challenges / mitigation measures

Conclusions

Conclusions

Recommendations

Appendices

For example, copies of data collection tools, respondent / key informant lists.

Click here for the editable version.

Writing Learning Objectives

Introduction

Learning objectives are an articulation of what your participants will know, or be able to do, after the session, course or programme. Learning objectives should be based on identified learning needs, and should guide every following step of the development process for learning materials. It is therefore essential to spend time and effort on getting them right!.

In this note we will:

- Explain why learning objectives are so important and how they support you as a facilitator;
- Describe how to write effective learning objectives.

Purpose of learning objectives

Learning objectives provide the link between the capacity gaps or learning needs, and the session, course or programme you design for your learners. They are an articulation of what the learners will know and be able to do after taking part in the learning event. Any session, course or programme should be designed to meet the identified learning objectives, not the other way around!

Objectives have many uses, including:

- Summarising your identified learning needs;
- Signalling to learners what to expect (which is very important for adult learners);
- Guiding decisions on what content must be included, and what can be left out;
- Informing the selection of appropriate methodologies and the design of appropriate activities;
- Guiding the trainer on how (not) to adapt a session, course or programme;
- Supporting the measurement of learning.

Writing SMART learning objectives

Before writing your learning objectives, you should have analysed the learning needs and worked out what the purpose of your learning event is. This is your aim: what you want the learning event to achieve. For example, the aim of a Training of Trainers might be:

To develop the skills and confidence to design and deliver effective training.

Once you have an aim, you can write your learning objectives. The objectives help us to be clear what we need to achieve through the learning event, and how we will measure its success. Learning objectives should therefore be SMART.

Specific : Well-defined and focused on what we want the learner to be able to do after the learning event;
Measurable : We will be able to evaluate whether the objective was met;
Achievable : It is realistic within the time and resources available;
Relevant : It relates to the identified needs, the other objectives and the context;
Time-bound : The time-frame is specified, i.e. "by the end of this session/training… ".

Choosing an appropriate action verb to start your objectives is the best way to make them specific and measurable. To help frame your objectives, use Bloom's taxonomy.

Using Bloom's Taxonomy

Bloom's taxonomy[7] classifies learning into levels of complexity, within three domains:

- Cognitive - knowledge and thinking skills;
- Affective - attitudes;
- Psychomotor - physical skills.

Each domain contains several levels at which learning can take place, and provides associated action verbs for learning objectives at each level. The levels within each domain are progressive; each level builds upon the previous one. This does not mean all levels need to be covered in a session, course or programme. It is important to know when to stop, and what is a sufficiently high level for your audience, content and context.

[7] Bloom's taxonomy is named after Benjamin Bloom who led the committee of educators who first devised the model. It has since been expanded and updated by a number of other people. (Original source, Benjamin Bloom, (1954), Taxonomy of Educational Objectives).

The higher up the levels we move in any of the domains, the more time is required to achieve learning at that level. It is important to consider at what level you can really expect learning to take place within the confines of the learning initiatives. In some cases (especially the affective domain), the higher levels cannot really be covered in a learning event. You may need to consider other (longer-term), capacity building approaches, or ways to incorporate the learning into the performance of the role itself.

The cognitive domain tends to be the most used in developing learning objectives for training courses and programmes.

To use Bloom's taxonomy, first decide at which level you need the learners to engage with the content. Choose the appropriate level, from the appropriate domain. Use the guiding questions to help you, and remember to refer back to SMART - what is achievable in the time you have available? What is relevant for your specific target audience?

Cognitive domain - knowledge and thinking skills		
Level	Guiding question	Action verbs
1. Remember	Can the learner recall or remember the information?	Define, list, state, recall
2. Understand	Can the learner explain ideas or concepts?	Describe, discuss, recognise, identify, select
3. Apply	Can the learner use new information in a new way?	Demonstrate, calculate, conduct, implement, use
4. Analyse	Can the learner distinguish between different parts?	Compare, contrast, critique, examine, test, question
5. Evaluate	Can the learner justify a stand or decision?	Judge, select, assess, investigate, defend
6. Create	Can the learner create a new product or point of view?	Create, design, develop, write, build

Affective domain - attitudes		
Level	**Guiding question**	**Action verbs**
1. Receive	Is the learner open to other experiences / opinions?	Ask, listen, discuss, attend, participate
2. Respond	Does the learner react and actively participate?	React, respond, clarify, contribute, question
3. Value	Does the learner attach value and express personal opinions?	Express, debate, challenge, justify
4. Organise	Does the learner develop a value system and reconcile internal conflicts?	Choose, formulate, compare, modify
5. Internalise	Does the learner behave consistently with their personal values?	Act, display, exemplify

Psychomotor domain - physical skills		
Level	**Guiding question**	**Action verbs**
1. Imitation	Can the learner observe and replicate an action?	Copy, repeat, reproduce, attempt
2. Manipulations	Can the learner reproduce an action from memory or instruction?	Re-create, follow, perform, conduct
3. Precision	Can the learner execute the skill accurately, without instruction?	Demonstrate, show, complete
4. Articulation	Can the learner adapt the action to integrate into a new context?	Solve, adapt, integrate, revise, modify
5. Naturalisation	Can the learner accurately perform the action as second nature?	Initiate, create, make, construct

Developing training

Introduction

Once you have identified that training needs to be part of your capacity building plan, and that there is not an existing training package relevant to the identified learning needs, your next step will be to develop new training. It is important to develop your training in a methodical way, to ensure that the final product applies adult learning theory, and is designed in line with the identified learning needs and target audience.

In this note we will:

- Describe a recommended process for developing training;
- Provide recommendations on when and how to involve an L&D colleague;
- List the components of a full training package.

> Throughout this document we refer to moments when you should seek input from your L&D Focal Point. If your organisation does not have an L&D Focal Point, you can seek support through the L&D Working Group at the Alliance by contacting learning@alliancecpha.org

Training development process

We recommend using the following process to develop new training courses. If you are developing a standalone session, replace course aim and objectives in step 2 with session aim and objectives, and skip step 3. You can use the course design template to work through steps 2-4.

Step 1: Review the learning needs

First, remind yourself of the learning needs which have been identified. If you do not have these, you cannot yet know that training is the best approach, and should go back a stage to complete an assessment of learning needs. Share the details of the learning needs and any related competencies with anyone who will be involved in the development of the training including subject matter experts, learning and development colleagues, any project sponsors and anyone who will review the training. Provide these stakeholders with details of which learning needs and/or competencies have been prioritised and which, specifically, you intend the training to contribute to meeting.

Step 2: Develop a course overview (Course design template tabs 1-3)

Based on the learning needs, develop the following:

- Course aim - what is the purpose of the course, in 1 or 2 sentences?
- Course objectives - what do you want the participants to know, or be able to do, after participating in the course? Refer to the Writing learning objectives guidance note for more details.
- Target audience description - who is the course designed for? What kind of roles? What level of experience? What kinds of context?
- Course description - how would you describe the course to a potential participant, in one paragraph? You may want to include details of any prerequisites.

Then, think about the topics you might want to include. Start by thinking big! Make a list or a mindmap of all the possible topics. Then, prioritise these into what the participants must know, should know, and could know. Refer back to your course aim and objectives, and your learning needs, to guide your prioritisation.

Now, take the must know and should know topics, and think about how you will sequence these. Draft a course agenda showing the order you will cover the topics. You may want to use Kolb's experiential learning cycle to help you pick a sequence, or there may be another logical flow to follow. For example, can you follow the stages of the project cycle, or can you start with the big picture and progressively narrow down to more specific content? Add an initial estimate of the time required for the course.

At this stage it is also good to give some initial thought to how you will evaluate your course. This will help to ensure you build in time and activities which enable you to carry out any evaluation which needs to happen before or during the course itself.

Review! We recommend that you pause here and review what you have so far. Share it with your key stakeholders, such as a reference group or your SMEs. Also share with your L&D focal point at this point, who will be able to check the relevance and level of the objectives, in relation to the learning needs, and the logic of the course sequencing.

Step 3: Develop a session overview (Course design template tab 4)

Once you have incorporated any feedback from the review of step 2, move on to step 3.

Based on the draft course agenda, for each session, identify the:

- Session aim
- Session objectives
- Estimated session duration

Remember that, combined, achieving your session objectives should lead to the course objectives being met. Check back to your course overview regularly, to ensure you are on track and not drifting away from the agreed course level objectives.

It is very common to try to include a lot within any training experience, so it is important to be aware of this tendency, and to make sure that content is always grounded in the identified learning needs and capacity assessment.

Review! Review again at this stage, with your key stakeholders. Your L&D focal point will be able to check the link between your course and session level objectives, ensure your session objectives are well formulated, and advise on your time estimates.

Step 4: Key learning points and methodologies (Course design template tab 5)

Once you have incorporated any feedback from the review of step 3, move on to step 4.

For each session, identify the key learning points (KLPs). Key learning points are the key messages, or most crucial pieces of information that participants need to get from the session, in order to meet the objectives. We recommend writing one per objective, although some objectives may need more than one key learning point. KLPs should be written in sufficient detail that they make sense on their own, and provide a useful piece of information to participants, even if this were all they were to obtain from the session.

For each session, consider what methodologies you will use in order to meet the session objectives and impart the key learning points. See our list of participatory methodologies for ideas. Draft an outline of what methodologies you will use, for which part of the session, and the estimated time you will need. For example,

- Energiser activity (5')
- Plenary activity: learning objectives review (10')
- Trainer input: Bloom's taxonomy theory (15')
- Pairs activity: Writing learning objectives (20')
- Plenary feedback (20')
- Individual reflection: learning log (5')
- Wrap up and close (5')

If you are designing for remote delivery, also include a note about what platform or technology you will need to deliver each methodology, for example breakout rooms, chat function, Miro board, Mentimeter.

Review! Review again at this stage, with your key stakeholders. Your L&D focal point will be able to check the key learning points and methodologies align to the objectives, and that the methodologies are in line with adult learning theory and cater to a range of learning style preferences.

Step 5: Develop session plans and resources

Next, develop full session plans for the facilitator. If you are developing for remote delivery, remember to include instructions for both the facilitator and the technical producer. See our session plan templates for a suggested layout.

Session plans (also called facilitator notes, facilitator guides, or session briefs) should be sufficiently detailed that another person with the relevant subject knowledge could deliver the session based on the contents of the session plan. The session plan acts to ensure a level of consistency in the delivery of the session, by providing clear guidance on the activities and key messages to be covered.

Session plans should start by stating the aim, objectives and key learning points of the session. Exercise instructions, key questions, timings, links (for remote sessions) and sources of further information are all important components of your session plans.

Alongside your session plan, develop any additional resources needed for the session. These will be the participant-facing resources, which help you to facilitate the session you have detailed in your session plan. The next section describes the various components you might need to develop.

Carry out a final review of the materials at this stage. You may want to gather feedback after drafting the session plans and before developing the other session resources. Your L&D focal point will be able to check the materials are complete, accurate and ready to use, that the objectives are met, and that adult learning theory is applied.

Training package components

Timetable: Required for all courses. Agenda for the course or programme. Best created in an editable format to which dates and specific times can be added for each iteration of the course.

Session plan: Required for all sessions. Detailed instructions for facilitator(s) delivering the session, explaining the chosen methodologies and providing specific key messages to meet the identified objectives.

Presentation: Optional. Slides that present key information covered in the session. Slides should primarily be used to share visuals, rather than text. Where text is included, this should be kept to a minimum.

Workbook or handbook: Optional. Information booklet for participants' use during the course, which includes notes on key content, key learning points, activities and space for reflections, such as a learning log.

Resources: Required for most sessions. Any resource that participants will use during a session, in order to enable them to complete activities. These may include:

- Case studies;
- Simulation briefing documents;
- Images, maps or diagrams;
- Video or audio files;
- Templates for individual or group activities.

Course design template

The course design template can be found here.

Course title	
Course aim	*In one sentence, what is the purpose of the course?*
Course objectives	*List 3-5 objectives that describe the knowledge or skills participants will gain by participating in the course. (Use Bloom's taxonomy to help formulate these.)* By the end of the course participants will be able to: - - - -
Course competencies	*Note any related competencies which will be developed by participating in the course*
Target audience	*For which types of role is this course appropriate, how much prior experience is required, are there any pre-requisites to participation?*
Course description (optional)	*In one paragraph, provide any additional useful info (background, linked initiatives, related learning pathways)*

Course content	1. List all potential topic areas (training content)
	2. Prioritise what is required to meet the course objectives, what would be nice to include, and what is not linked to the course objectives and can be excluded
	3. Structure the prioritised content into a draft agenda wich a logical flow through the topics

Session plan template

Session title, course name

Session length:

Session aim:

Session objectives. By the end of the session, participants will be able to:

-
-
-

Key learning points:

-
-
-

Preparation required:
Note here any specific actions the facilitator needs to take ahead of the session, for example, preparing flipcharts or Miro boards, arranging the training room in a particular way, allocating participants to groups for an upcoming exercise.

Time	Facilitator notes	Producer notes (remote training only)	Screen / resource
Note here the duration of this	*Detail here what the facilitator should say and do for each section of the session*	*For remotely facilitated sessions, detail here what the technical producer should do, including links*	*Note here what visual, slide or resource is*

section		*to additional platforms and resources*	*needed for this section*

Supporting information:
Include here any supporting information for the facilitator, such as additional details on specific models or theories used in the session.

Click here for an editable version.

Facilitator Guide template

Course title: Facilitator guide

Course description:
Include here a brief narrative description of the course.

Target audience:
Include here a description of the target audience for whom this course was designed.

Course aim:

Course objectives. By the end of the course, participants will be able to:

-
-
-

Related competencies:
Include here an overview of the competencies addressed by the course, and at which level. Refer to the [CPHA Competency Framework](#).

Pre-requisites:
Include here details of any pre-learning or existing knowledge and skills participants are expected to have to participate fully in the course.

Equipment, materials and preparation required:
Note here any specific equipment, resources or actions the facilitator needs to take ahead of the course, for example, sharing pre-course learning, setting up online collaboration spaces or tools.

Agenda

Insert here a copy of the course agenda, including any activities which take place before or after the course, or between live sessions.

Supporting information:
Include here any supporting information for the facilitator, such as:

- *Any specific recommendations for adapting or contextualising the course;*
- *Recommended group sizes;*
- *Recommended reading to support facilitator preparation.*

Welcome and introductions

Session length: To introduce participants to the course, each other and the facilitation team.

Session aim:

Session objectives. By the end of the session, participants will be able to:

-
-
-

Key learning points:

-
-
-

Preparation required:
Note here any specific actions the facilitator needs to take ahead of the session, for example, preparing flipcharts or Miro boards, arranging the training room in a particular way, allocating participants to groups for an upcoming exercise.

Time	Facilitator notes	Producer notes (remote training only)	Screen / resource
Note here the duration of this section	*Detail here what the facilitator should say and do for each section of the session*	*For remotely facilitated sessions, detail here what the technical producer should do, including links to additional platforms and resources*	*Note here what visual, slide or resource is needed for this section*

Supporting information:
Include here any supporting information for the facilitator, such as additional details on specific models or theories used in the session.

Session title

Session length:

Session aim:

Session objectives. By the end of the session, participants will be able to:

-
-
-

Key learning points:

-

-
-

Preparation required:
Note here any specific actions the facilitator needs to take ahead of the session, for example, preparing flipcharts or Miro boards, arranging the training room in a particular way, allocating participants to groups for an upcoming exercise.

Time	Facilitator notes	Producer notes (remote training only)	Screen / resource
Note here the duration of this section	*Detail here what the facilitator should say and do for each section of the session*	*For remotely facilitated sessions, detail here what the technical producer should do, including links to additional platforms and resources*	*Note here what visual, slide or resource is needed for this section*

Supporting information:
Include here any supporting information for the facilitator, such as additional details on specific models or theories used in the session.

Session title

Session length:

Session aim:

Session objectives. By the end of the session, participants will be able to:

-
-
-

Key learning points:

-
-
-

Preparation required:
Note here any specific actions the facilitator needs to take ahead of the session, for example, preparing flipcharts or Miro boards, arranging the training room in a particular way, allocating participants to groups for an upcoming exercise.

Time	Facilitator notes	Producer notes (remote training only)	Screen / resource
Note here the duration of this section	*Detail here what the facilitator should say and do for each section of the session*	*For remotely facilitated sessions, detail here what the technical producer should do, including links to additional platforms and resources*	*Note here what visual, slide or resource is needed for this section*

Supporting information:

Include here any supporting information for the facilitator, such as additional details on specific models or theories used in the session.

Evaluation and close

Session length:

Session aim: To collect participant feedback, recap key learning points and close the course.

Session objectives. By the end of the session, participants will be able to:

-
-
-

Key learning points:

-
-
-

Preparation required:
Note here any specific actions the facilitator needs to take ahead of the session, for example, preparing flipcharts or Miro boards, arranging the training room in a particular way, allocating participants to groups for an upcoming exercise.

Time	Facilitator notes	Producer notes (remote training only)	Screen / resource
Note here the	*Detail here what the facilitator should say and do for each section*	*For remotely facilitated sessions, detail here what*	*Note here what visual,*

duration of this section	*of the session*	*the technical producer should do, including links to additional platforms and resources*	*slide or resource is needed for this section*

Supporting information:
Include here any supporting information for the facilitator, such as additional details on specific models or theories used in the session.

NB: Add additional session plan sections as required for the number of sessions in course.

[Click here](#) for an editable version.

List of participatory methodologies

Grouping Options

Individual work: Refers to participants working on their own. This often includes reflection activities, and may also be a useful preparatory phase for other activities which are done with other learners. [Possible online, or offline between 'live' online sessions]

Pairs work: Refers to two participants working together. It may be a discussion, but may also be combined with many other methodologies listed below. [Possible online using breakout rooms]

Small group work: Refers to participants working in groups of 3-5. Combines well with a range of the methodologies listed below. [Possible online using breakout rooms]

Plenary: Refers to working with the whole group at once, for example for a discussion, Q&A session, or presentation. [Possible online]

Round-table: A means to ensure that everyone gets a chance to contribute, this simply refers to asking each participant in turn, to share their idea or question. [Possible online]

Think, Pair, Share: Participants first think about a question or issue individually. Then, they are paired with another participant to discuss their own thoughts. Then, the pair share key points of their conversation with the rest of the group. [Possible online using breakout rooms]

Snowballing: This is the process of making a discussion bigger, by adding more and more participants. Similar to think, pair, share but starting with two or more participants. Commonly starts with participants working in pairs, which join to make 4s, which join to make 8s. [Possible online using breakout rooms]

Methodologies

Brainstorm: Brainstorming is a means of generating ideas quickly, and should encourage divergent thinking. To get to good ideas, it is good practice to structure your brainstorming to provide time for individual thinking, and a means to ensure every participant contributes their ideas, for example by using a mixture of individual work, round-the-table and plenary discussion. [Possible online]

Carousel: Carousel refers to activities that are conducted in sections, where participants rotate around the different elements, spending time working on each. For example, having 4 small groups of participants identify what needs to be done at the four different stages of a project, working on one stage, then rotating and building on the ideas of the previous group whilst considering the activities required at the next stage. [Possible online using breakout rooms]

Case studies / Scenarios: Case studies describe a real or fictional scenario and create an opportunity for participants to consider how they would apply their learning in practice, by thinking about the specifics of the example shared. [Possible online]

Fishbowl: Fishbowl is a way of managing large group discussion, by focusing attention on a small group of participants at a time. The selected participants sit in an inner circle and conduct a discussion. Remaining participants sit around them in a larger circle and observe the discussion. One chair in the inner circle can be made available for ‘visitors’, and members so the external circle can be invited to move in and out of the discussion. [Needs significant adaptation for online]

Gallery Walk: Gallery walk is a reflective methodology, where participants move around the learning space, reviewing and reflecting on information that is displayed around the space, as if they are in an art gallery. They should be provided with a key question before commencing, and should then use the reflections in a subsequent activity or discussion. [Needs significant adaptation for online]

Matching Activities: Activities where participants need to match two pieces of information, such as terms and definitions, or questions and answers. [Possible online]

Peer consultancy: Peer consultancy is a problem-solving methodology, where participants are engaged by a peer, or a group of peers within the learning environment, in an advisory capacity. The individual or group explains a current problem or challenge, and the ‘consultant’ asks questions to extend their thinking. [Possible online using breakout rooms]

Power Walk: Power walks are a way to explore power dynamics in a situation or context. Participants can participate as themselves, or as an assigned ‘character’. First, participants line up side by side. The facilitator then reads out a number of statements and participants step forward, if they/their character would hold power in the stated situation, or backward, if they would not. The movements and final positions of the participants are then used to generate a discussion about power dynamics and what influences them. [Needs significant adaptation for online]

Rich pictures: Rich pictures is a creative methodology that invites participants to conceptualise a situation, structure or challenge visually, by drawing it. The pictures are then used to guide a conversation about the issue. The purpose is to move participants from thinking to feeling, and in doing so, to encourage alternative ways to consider the issue and invite alternative solutions. [Needs significant adaptation for online]

Role plays: Role plays are the acting out of a situation, in order for participants to practice how they would respond to a set of circumstances. They should also be well debriefed, so as to help participants identify their key learning and any actions to take forward into the real situation in future. [Possible online using breakout rooms]

Simulations: Simulations are effectively a combination of case studies/scenarios and role plays, wherein participants are put into a realistic situation and must respond either as themselves, or in character as a specific role. The purpose is usually to provide a safe environment in which to practice putting knowledge and skills into practice, but simulations may also be used to assess learning or test competence. The purpose must be made clear to participants and facilitators before starting the simulation.

Sorting Activities: Activities where participants need to organise information into categories, or into a sequence or order. For example, putting the steps of a process into sequence, ranking a series of statements from most to least important, or sorting a series of tasks by the role responsible for carrying them out. [Possible online]

Voting / Vote with your feet: Voting is a means to elicit opinions and preferences from participants. It can be done visually for example by raising hands, or adding stickers to a chart, or kinesthetically, by asking participants to move to a certain part of the room, based on their response. [Needs significant adaptation for online]

World cafe: World cafe is a discussion-based methodology, which gives participants the autonomy to decide which discussion they want to participate in, and for how long. To set up, create a number of tables or breakout rooms and assign a topic and some key questions to each. Then invite participants to move to and between tables, as suits their interests, to engage in one or more discussions. It can be useful to have a 'host' for each discussion who stays with the topic and captures inputs and feedback. [Possible online using breakout rooms]

For more ideas and activities, see these resources:

- Liberating Structures: http://www.liberatingstructures.com/ls-menu/
- Hyper Island Toolbox: https://toolbox.hyperisland.com

Contextualising training materials

Introduction

Many CPHA learning packages are developed at the global level, with the expectation that they will be contextualised before use with a specific national or regional audience.

In this note we will:

- Explain why it is important to contextualise learning materials;
- Identify some actions to take during course design to support contextualisation later;
- Describe a recommended process for contextualising a training package.

Why contextualise?

The main reason to contextualise training materials is to maximise the **relevance** to the learners. Contextualising your materials can make it easier for your participants to link the content with their existing knowledge and experience, which is a central principle of working with adult learners.

The more relevant the course, the more **engaged** the learners are likely to be, and the more **applicable** it will be to their professional lives. This, in turn, increases the likelihood that the course objectives will be met and the capacity gaps will be filled.

Designing for contextualisation

If you are designing a new training package which you know will be contextualised for use in a number of regions or countries, consider the following tips:

- Bring in regional perspectives at the design stage, so that the content is more representative from the beginning of the process. This may include incorporating data from regional LNAs into the design of course aims and learning objectives.
- Set the level and clarify the intended audience. Include a description of the intended audience so that those using the package are clear on the level (of knowledge and skill or experience) it is targeted at. Where possible, link this to a shared framework with the CPHA

Competency Framework, by stating the intended audience in terms of the levels in the competency framework.

- Provide a course description with key information including: course aim, course objectives, sample agenda, facilitation requirements.
- Provide an overview of contextualisation needs. Make it clear which sessions are general and which are specific and will need to be contextualised. Flag which parts of the package may be more sensitive in different settings and may need to be adapted or removed.
- Keep the structure and design of the course and sessions simple, so it is easier to adapt.
- Modularise the content, so that it can be put together according to the specific learning needs, level of knowledge and expertise of the audience, in the chosen context. Where possible, provide activity options which cater to different levels, for example a peer consulting or capacity sharing activity for more advanced audiences.
- Identify what each case study or example is there to illustrate, to facilitate the selection of context-specific options by the person contextualising the course. For example, alongside a global case study, note that in replacing this with a regional alternative, the facilitator should seek a case study which: addresses children at risk of early marriage, within a refugee context, and provides examples of positive actions taken by child protection actors to respond to the case appropriately.
- Alternatively, provide outline case studies which are very general, and invite the specifics to be added based on the local context where the course will be taking place, or collect and provide a variety of case studies for different contexts.
- Start general to go local. This applies to training and to webinars, and is the idea of providing general (global) input through presentations or initial activities, and then increasing the relevance to a specific context through eliciting inputs from the participants, e.g. through a Q&A, discussion-based activity, or experience sharing.
- Budget for, or seek financial support for translation into key languages, as this process makes up a large proportion of the contextualisation process, and the cost can be prohibitive.

A SUGGESTED PROCESS TO CONTEXTUALISE

Our recommended simple process for contextualising a training package is as follows. Please note this assumes that the learning needs of your participants align with the learning objectives of the course, and that substantial changes to the course design are not required.

1. **Agenda**

Look at the agenda and consider whether:

- You need to add time for prayer;
- The breaks need to be longer to provide contingency for late arrivals;
- Your participants need to travel during daylight hours;
- Standard working hours in the context are in line with the training agenda;
- Your participants are travelling internationally.

Adjust the start, finish and break times accordingly.

2. Legal framework

Where required, update any references to legal frameworks, in line with the law in the country or region where the training is taking place. For example:

- Make sure you include reference to relevant regional and national legal frameworks;
- Where necessary and possible update the definitions of key terms and concepts to connect global and regional/national legal frameworks.

Where this is not feasible make sure you explain the differences in the terminologies used.

3. Case studies

Review the case studies and decide whether these need to be changed. You can consider:

- Using the context in which the participants are working - this may make the case study easier for participants to relate to, and is often the preference of learners. It is important to note that localised case studies can also distract from the task in hand, if participants have additional knowledge or experience of the case which they wish to input, or which confuses or complicates the point which the case study is trying to illustrate.

- Using a different context but similar programmatic content - this can be a good way to direct participants to the content questions without getting distracted by specifics of a context, and can also provide something new for them to react to, by presenting a context with which they are not yet familiar.

- Using a fictional example which highlights what is likely to happen in reality, but which is not associated with a specific response, country or organisation in which participants may have work, and to which they may associate additional information or judgements.

4. Session methodologies

Review the methodologies in the sessions to ensure these are appropriate and relevant to the context. This may include:

- Adding any extra information to facilitator notes to guide group work and activities, e.g. what to consider in group composition (if men and women can be in a group together);
- Checking suggested energisers, e.g. replacing energisers which require physical contact between participants with no-contact alternatives;
- Adding notes on appropriate ways to provide feedback in the culture/context, e.g. whether this can be done in plenary or needs to be in smaller groups, whether hierarchical working relationships will impact who can provide feedback to whom;
- Adjusting any methodologies which are not appropriate in the context. We encourage the use of participatory and experiential learning activities even in contexts where these are not common in the formal education system and therefore may be unknown or unusual for your participants. In such contexts it is essential to:
    - Create a safe learning environment
    - Explain the purpose of activities
    - Provide clear instructions
    - Support participants during exercises
    - Debrief exercises and provide time for individual reflection.

5. Other materials

Review the rest of the materials to ensure these are appropriate and relevant to the context. This may include:

- Updating photos/videos/images to reflect the local context;
- Checking appropriate language is used, such as context-specific expressions.

6. Language

Consider what language you will deliver the training in, and whether you need to translate the materials and/or work with an interpreter.

When translating materials:

- Seek a translator with experience in the sector and preferably, in the technical area of the training to ensure that translations are accurate;

- Ensure the translation is appropriate by checking that the concepts themselves (rather than just the words) translate into the chosen language.

When working with interpreters:

- Expect and plan for the training to take longer. Adjust the agenda to factor in time for the interpretation;
- Brief them on the topic, including specific terminology you are likely to be using. Agree on a glossary of terms;
- Talk through what will happen in each session, including an outline of the different methodologies and their role during group exercises;
- Where possible, group participants so that one member of each group speaks both the local language and the language of the facilitator(s). This will help with checking in on the groups and with exercise feedback and debriefs.

Contextualising the delivery

To deliver the course in a contextually relevant way, it is best to use facilitators with good familiarity of the context, who will be able to:

- Provide examples and experiences from the country/region;
- Understand the cultural context and traditions, and incorporate these into the way the group is managed;
- Use language and expressions which resonate with the participants.

Coordinating training checklist
In-person training

In-person training (click here for editable version)

Actions	Responsible	Complete
3 months before		
• Define selection criteria and application process • Publicise the event • Decide who will be involved in decision-making • Set application and selection timeline • Develop facilitator ToRs • Recruit / identify / contract facilitators • Define venue requirements and budget • Identify and compare potential options • Select and book venue		
6 weeks before		
• Review applications • Contact successful candidates • Contact unsuccessful candidates and waiting list candidates • Collect details of learning needs, dietary and special requirements, emergency contacts • Share the materials with facilitators • Agree who will facilitate which parts of the programme • Agree on any contextualisation of materials needed and who will do this		

• Book preparation call(s) with facilitators		
1 month before		

• Collect details of dietary and special requirements, emergency contacts
• Share agenda with venue
• Confirm breakout room and equipment requirements with venue
• Develop and share Joining Instructions include:
  ○ Dates and times
  ○ Venue details
  ○ Accommodation details or suggestions
  ○ Travel advice / transfer or pick up details
  ○ Pre-learning instructions
  ○ What to bring
• Collect participant travel itineraries
• Book facilitator travel and accommodation
• Order equipment and stationery		

2 weeks before		
• Confirm catering needs and any specific dietary requirements with venue • Arrange transfers or pick ups • Arrange security briefing upon arrival, if required • Print course materials • Collect supporting resources, if required		
1 day before		
• Set up the training room(s) • Check equipment is working • Prepare participant resource packs		

• Prepare name badges • Prepare reference materials		
During event		
• Print certificates • Collect daily evaluation data / feedback • Coordinate regular facilitator debriefs • Liaise with the venue • Coordinate guests, actors, other resource persons • Organise evening social event, if required		
After event		
• Thank you emails to participants, facilitators, guests • Collect and pay invoices • Share contact list (with permission) • Share follow-up resources		

Coordinating training checklist
Remote training

Remotely-facilitated training (click here for editable version)

Actions	Responsible	Complete
3 months before		
• Define selection criteria and application process • Publicise the event • Decide who will be involved in decision-making • Set application and selection timeline • Develop facilitator ToRs • Recruit / identify / contract facilitators		
6 weeks before		
• Review applications • Contact successful candidates • Contact unsuccessful candidates and waiting list candidates • Collect details of learning needs • Share the materials with facilitators • Agree on any contextualisation of materials needed and who will do this • Book preparation call(s) with facilitators • Agree who will facilitate which parts of the programme		

1 month before		

• Select your online platform(s)
• Familiarise facilitators with platform(s)
• Confirm programme agenda including:
  ○ Pre-work requirements
  ○ Live session times
  ○ Platform/technology requirements		

2 weeks before		
• Check audio and video quality for facilitators • Set up online learning space, e.g. shared folders, discussion forum, fetc. • Run platform induction with participants • Post any physical materials to participants		
During event		
• Act as technical producer during lives sessions • Share links and access to additional tools and platforms • Collect daily evaluation data / feedback • Coordinate regular facilitator debriefs • Coordinate guests, actors, other resource persons		
After event		
• Prepare and send certificates • Thank you emails to participants, facilitators, guests • Collect and pay invoices, if applicable • Share contact list (with permission) • Share follow-up resources		

Remote facilitation

Introduction

Increasingly, training and learning events are delivered remotely, with participants joining from a range of locations via online conference calling platforms. While many of the same skills are required to facilitate remotely as are used to facilitate in person, there are some key differences which should be taken into account.

In this note we will:

- Provide top tips for remote facilitation of training sessions;
- List additional resources for learning more about designing and delivering remote sessions.

Top Tips

Don't copy and paste - taking face to face training materials and putting them into a remote session is unlikely to give the desired results. Particularly consider the following:

Allow more time - expect remotely facilitated activities to take around 20% longer than they take in a training room, and plan accordingly. We recommend extending the timings on your activities, and to leave some contingency time in your session plans, in case of questions, discussions, or technical challenges.

Take it offline - think about what needs to be done together, online, during a live session, and what can or should be done individually, offline, between sessions. Schedule accordingly, and make sure your participants know in advance what the full programme agenda looks like, and the time input required from them.

Link content - be sure to make clear and strong links between work completed before and between sessions, and the content of the live sessions. This is always important for adult learners, but especially so in a remote programme.

Technical producer - identify a colleague to be your technical producer. While you concentrate on facilitating the people and the content, they concentrate on managing the technology. Between you, you should be able to provide a smooth experience for the learners.

Set expectations - let people know in advance that you expect them to be fully engaged, to participate in the session, to have their video on and use their audio to contribute to the session. If people are used to online meetings or webinars, they may be planning to multitask - let them know that this won't be possible.

Create the learning environment - make your session immediately feel different from other online meetings! Use an onboarding activity to create an immediate sense of a new environment, in which learners are expected to actively engage, focus, and participate.

Welcome everyone in - at the start of your course or programme, take the time to do introductions and ensure you invite each individual to speak. This really increases the likelihood that they will continue to contribute throughout the session(s) and increases the sense of community in the group.

Provide regular interaction - for remotely facilitated sessions, it is recommended to have your participants interact every 5-7 mins. This might be through something as simple as using the built in reactions to give you a thumbs up or answering a question in the chat, all the way to engaging in detailed group activities. Try not to go more than 7 minutes without checking that your participants are still with you.

Go outside the platform - introduce one or two additional tools or platforms, outside of the platform you are using for the call. This will help to make the session more engaging, by introducing new ways to collaborate. Don't use too many, and remember these tools are there to support the delivery of the session; they are the means not the purpose.

Consider what your participants see - when you share slides on a video call, your own video is reduced to thumbnail size. Consider what is more engaging for your participants - the content of the slides, or being able to see you. Do you really need slides? Are there other ways to share key content? Can you use a virtual background instead, so your video is not reduced?

Movement and physical space - participating in remotely facilitated training is physically more static, then when you have a training room to move around in. Include activities which encourage your participants to get up and move around, or to find things in their physical space and use these in the session.

Schedule regular breaks - linked to movement, schedule regular, short breaks. We recommend 5-10 minutes every hour, to give people time to move their eyes from the screen, stretch and move their bodies.

Additional resources

- Radically Remote toolkit and free online course: https://radicallyremote.com
- Developing your facilitation style: https://theconversationfactory.podia.com/courses/developing-your-facilitation-style-what-are-your-hats

Designing webinars

Introduction

A webinar is a live, online learning event in which participants can obtain new knowledge and insights. It connects individuals with expertise or experience in a subject with an audience that is interested to hear this expertise or experience. In this note we will:

- Identify top tips for designing a successful webinar;
- List ways to avoid technical problems;
- Provide a checklist of actions to prepare, run and follow up your webinar.

> **Diversity of Voices:** The Alliance for Child Protection in Humanitarian Action is committed to sharing a diversity of voices during our webinars. It is expected that speakers and panellists represent a diversity of perspectives. This type of planning should be a natural outgrowth of our working groups / task forces.

Webinar design tips

1. Deliver on the expectations of the learner – provide solutions, education, and inspiration.

Leave your attendees with key takeaways and action items. But be sure to make it entertaining – tell stories, speak to personal experiences, include video or bold imagery. Case studies or real-world scenarios also work really well to help illustrate points. Global level views if too lengthy might not be too useful to field practitioners.
Identify some key messages you want to communicate through the webinar and make the panel and host aware. Encourage the host to draw these out through the questions, and in their wrap up.

2. Encourage speakers to have personality and add energy.

It can sometimes be awkward when you have to present to your computer screen and you don't have an in-person audience to infuse natural energy. Standing up to present (with the right headset to ensure audio quality) can also help ease a presenter who is more used to in-person events.

3. Speak the language of your audience.

When preparing your webinar presentation, know who is on the webinar. If you have a varied audience, that is okay, but be sure to acknowledge that on the live webinar and set the expectation that some of the content may not be completely applicable. This is also a great way to encourage post-event follow-up if you are unable to address specific audiences.

4. Remove the fear of presenting.

Presenting can be scary and doesn't always come naturally. If a presenter also lacks confidence with the required technology, this can make the process even more nerve-wracking. Consider practising the presentation out loud, and/or having a co-presenters share the presentation and to help moderate. Always have a training session on the technology before the live presentation to reduce fears about how the webinar platform works. Lastly, always do a thorough sound check – bad audio can ruin the best presentation.

5. Create a slide deck that encourages engagement.

- Include polls, quizzes, virtual whiteboards, and breaks for questions, or even encourage attendees to openly use the chat window to share ideas.
- Know the flow of the presentation and your story.
- Avoid cobbling together a presentation from old decks – start with the narrative first, then build the presentation.
- The webinar overall length should not be longer than 60 minutes where 5 minutes are eaten by waiting and welcoming of participants, 25 minutes of content and 25 minutes available for Q&A)
- Leave time at the end for questions and conversation. This can be a great way to infuse the participants' own personal experiences around the topic.

6. Rehearse – but not too much!

Know your narrative in and out, but don't rehearse to the point that the delivery feels rigid. Try not to read your slides, but rather create a small narrative that embeds the main points on the slides.

Rehearsing will also help boost the confidence of the presenter. Comfortable, interactive, and confident speakers top the list of how to ensure your next webinar will be a success.

Avoiding technical issues

Roles

For a successful webinar you should plan to have a technical producer, to work alongside the panel members (who will share their experience) and the host (who will facilitate the conversation).
The technical producer works behind-the-scenes to manage the technology for the webinar. This includes:

- Admitting the participants;
- Starting any live streams or recording;
- Ensuring any simultaneous interpretation is set up and activated;
- Proving back-up to share slides or other screens, should problems arise;
- Monitoring and managing the chat and Q&A, highlighting key points to the host or presenters.

Setup

The points below apply both to the people running the session ("Moderators") and the people attending the session ("Participants").

- Be sure that the browser you are going to use is suitable for the online delivery platform;
- If you are using wi-fi, try to be as close to the router as possible;
- Close any streaming services (such as YouTube) before joining a session;
- Use a headset for the best audio quality, with a microphone if you are going to be speaking;
- Sit in front of a plain, tidy background, or use a branded slide as a virtual background.

Practice

Where possible you should have a practice session using the same equipment and rooms as the real session to ensure everything will work successfully. Be sure to test the video and sound quality of all your panelists, and test any other features you will use, such as screen sharing, polling, or additional language channels.

Coordinating webinars checklist

([Click here](#) for editable version)

Before Webinar – 6-8 weeks before

Activity	Who?	Done?	Comment
Choose a suitable date: In collaboration with the Alliance Secretariat, choose a suitable date. ● Prevent overlapping with other Alliance events. ● Consider if there are any major holidays or other events that may impact signup or attendance. ● Consider the time zone that the majority of your ideal attendees will be in. Tuesday to Thursday, afternoons 13:00 to 15:00 Central European Time seem to work best for the Alliance attendees (depending on the season).			
Choose suitable speakers and/or host and co-hosts ● Have extra support when running online activities. ● Consider having a host and co-host to facilitate the webinar, a moderator to guide online discussion and Q&A sessions, another moderator to collect			

questions from the chat box, and a diverse range of speakers.			
Choose a relevant and unique topic: The Alliance holds webinars each month, all of which are posted on our website and YouTube channel. ● Consider the differing topics of the already-existing webinars to avoid duplication or repetition.			
Set clear goals and learning outcomes: Learning outcomes enable you to communicate what you expect your learners to know or be able to do by the end of your webinar. Outcomes are more precise and measurable than aims or statements of purpose. What are the benefits of using learning outcomes? ● Clarifies what is expected. ● Manages the expectations of your learners. ● Helps you simplify difficult decisions about what content is in and out of scope. ● Helps you assess what learning is taking place.			

Before Webinar – 4 weeks before

Activity	Who?	Done?	Comment
Set-up the Webinar Registration. The Alliance holds webinars through our Zoom account, as the registration links are easily shareable and the webinars can then be livestreamed on the Alliance Facebook page.			
Prepare an overview of your webinar, outlining the content and key takeaways that your audience can expect should they sign up. This synopsis would also be used to post on the Alliance website and social media platforms. In addition, create a flyer to advertise the webinar, including: • Title of the webinar. • Date and time with time zone included. • Description of the topics with information on time and speakers/panellists to be featured. • Speaker bios, headshots, and description of their topic. • Any other related links or social media to follow. • Email to which participants should send their questions. • Registration/Sign-in information (to be provided by the Alliance KM focal point).			

Create slide deck: • Create a webinar slide deck that encourages engagement and guarantees staying within a maximum of 30 minutes' worth of presentation between all speakers, in line with the set learning outcomes. • Ensure to leave time for questions and discussion at the end of the webinar. Generally, the less presentations, the better.			
Promote your Webinar: In coordination with The Alliance Secretariat, promote the webinar online and through social media platforms. • This also includes additional online or social media promotion outside of the Alliance. • Engage WG/TF members to share the announcement within their agencies. • Request participants to send questions before the webinar.			

Before Webinar – 1-2 weeks before

Activity	Who?	Done?	Comment
Upload Webinar slide deck into your webinar platform.			

Do a practice-run of the Webinar with other co-hosts and speakers: ● Use this practice to test the audio and visuals of your webinar, along with the progression of slides and the time used by each speaker. ● Always do a thorough sound check – bad audio can ruin the best presentation. ● Test any other features you will use, such as polling, or language channels.			
Rehearse webinar content: But not too much! ● Ensure you are comfortable with your material, but not so rehearsed that the presentation sounds scripted.			
Send out a reminder: ● Send out a reminder to the Alliance Secretariat to boost social media messages and promotion in order to get your participants thinking about the topic of the webinar.			

Day of Webinar

Activity	Who?	Done?	Comment
Eliminate all distractions: ● Find a quiet place to host the webinar and close any online distractions as well. ● This includes putting your phone on silent and turning off notifications from			

platforms such as Skype, Facebook, and WhatsApp.			
Set-up 30 minutes prior to webinar: • Ask the host and speakers to join you in the webinar before the start time to ensure good connection and that the audio/visuals are working properly. • Start the live streaming a few minutes before the webinar begins. • Don't forget to hit record!			
Gather and answer questions: Prepare seed questions to encourage dialogue in case your audience is shy.			

During Webinar

Activity	Who?	Done?	Comment
Record the webinar. In coordination with the Alliance Secretariat, ensure that the webinar is being recorded live and being live streamed to the Alliance's Facebook page. (The Alliance KM Focal Point can support you with this.)			
Start with a brief welcome: • Welcome participants, • Introduce the Alliance and your WG/TF. • Introduce speakers, and provide a reminder of what your audience is going to get out of the webinar.			

- Provide a short tutorial on how to use the Q&A function, the chat function and raise hand function. - Encourage attendees to introduce themselves by using the chat function. - Request participants not to mention any specific cases of children and to respect confidentiality in the chat. - Inform participants that the webinar is being recorded and that by participating they consent to this.			
Stay on mute: Mute yourself if your co-facilitator is speaking to reduce any additional background noise or headphone feedback.			
Share useful additional info in the chat: Share useful links and additional resources related to the topics being discussed via the chat box.			
Ask for Feedback: We are always looking to improve. - Request your audience to provide feedback during/after the webinar. - When using Zoom, there is a polling feature for webinars that allows you to create single or multiple-choice questions that participants can answer during the webinar.			

Provide contact details: ● After the final Q&A, wrap up by providing contact details and any relevant links to the webinar, including The Alliance website and any specific Alliance resources. ● Remind participants that the recording of the webinar will be immediately available on the Alliance's Facebook page. ● The edited version with detailed show notes will be available on the Alliance's YouTube Channel.			

After Webinar

Activity	Who?	Done?	Comment
Convert recording into a viewable file and download video: ● It is important as the host of the webinar to download and save a copy of the webinar recording for their records to prevent loss of the video.			
Send a follow-up email to attendees with Webinar recording: Include the link to both the recording and feedback poll.			
Edit Webinar recording: Webinar live recordings should be edited before the recording is posted to take out portions of the webinar not applicable to those not listening in live. For example, when hosts are giving instructions to participants for asking questions in the chat box.			

Create Webinar Show Notes: The edited version of the webinar should also include ‘show notes’ with specific time stamps. The show notes provide a small summary of the webinar and content covered to allow viewers to go directly to certain sections of the webinar.			
Thank your panelists and hosts! Share with them the number of people reached by the webinar so far, and the links to share the recording.			

Evaluating learning

Introduction

Evaluating our learning and development activities, and the changes in competence of our participants is important for a number of reasons, but can be difficult to do once learners leave the training environment. It is important to consider how you will evaluate your capacity building interventions during the design phase, in order to build in the required methodologies, expectations and budget.

In this note we will:

- List reasons why evaluating L&D activities is important;
- Introduce Kirkpatrick's four levels of evaluation;
- Outline what, when and how to measure at each of the four levels.

Why evaluate?

You may have different reasons to evaluate your learning and development activities. Knowing why you are evaluating will help you to select an appropriate approach, timeframe and audience. One or more of the following might be behind your decision to evaluate:

- To recognise what changes in knowledge, skills or attitudes have taken place;
- To identify outstanding learning needs;
- To inform improvements to the course or learning activity design;
- To demonstrate the value of the learning activity;
- To support funding requests for future learning activities;
- To understand the impact on the community or response.

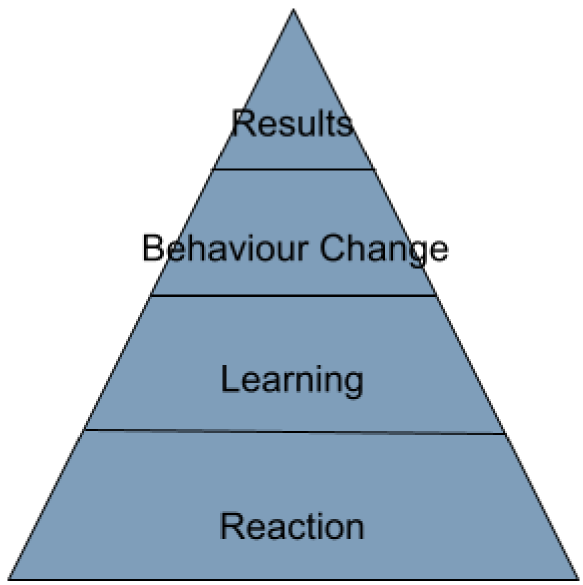
Kirkpatrick's Four Levels of Evaluation

Donald Kirkpatrick developed a model[8] for evaluating training and learning activities, which suggests we evaluate at four levels:

[8] This section based on the work of Donald Kirkpatrick: https://www.kirkpatrickpartners.com

1. **Reaction:** Participants react in a positive way to their learning experience.
2. **Learning:** Participants learn new information and gain new knowledge.
3. **Behaviour Change:** Changes are seen in behaviour as a result of what participants learnt.
4. **Results:** New behaviours contribute to results (or impact) for the organisation, or the response.

The model is based on the premise that we cannot expect performance to improve just from training. The 4 levels build a sequence of reinforcing interventions, which are required to achieve significant impact.



The levels are commonly presented on a triangle, with level 1, reaction, at the bottom, and level 4, results, at the top. This helps to visualise the amount of data you are likely to be able to collect, which reduces as you move up the levels. At level 1, you are likely to have a lot of data collected from learners during and immediately after a learning intervention. By level 4, you are likely to have a small amount of more in-depth data which can illustrate (rather than demonstrate) the impact of the learning intervention on results.

What, When and How

At each level the process of evaluating becomes more difficult and more time-consuming, but the information usually becomes more valuable. The following table gives key guidance on evaluating at each level

	Level 1	Level 2	Level 3	Level 4
What are we measuring?	Reaction - participant satisfaction	Learning	Behaviour change	Results - impact on organisation or response
When do we measure?	During and immediately after learning intervention	During and immediately after learning intervention	3-6 months after the start of the learning intervention	6-12 months after the end of the learning intervention
Who do we ask?	Participants	Participants	Participants, line managers, service users	Participants, line managers or other colleagues, service users / target population
How do we (usually) measure?	Evaluation survey / form	Pre / post self-assessment, quizzes or knowledge checks during sessions	Survey or interview of participants, peers or managers, reflective journal, observation	Survey or interview of participants, peers or managers, project evaluation

Example key questions	- To what extent did the course/learning event meet your expectations?
	- To what extent was the course/learning event relevant to your role?
		- To what extent were the learning objectives met?
		- What three key learnings are you taking from the course/learning event?
			- How have you used the learning from the course/event?
			- Have you made any changes in how you [insert activity]?
			  - If so, what?
			  - If not, why not?
				- Has your participation in the course/learning event had an impact on your project/organisation/target population?
				  - If so, please describe how?

	- How would you rate the facilitation of the course/learning event? - How would you rate the venue and logistical arrangements?	- How will you use these key learnings in your work?	- What obstacles have prevented you from using your learning from the course/event in your work?	- If not, what has prevented this? - Did you experience any changes in the services you received following the capacity building event?

Piloting learning materials

Introduction

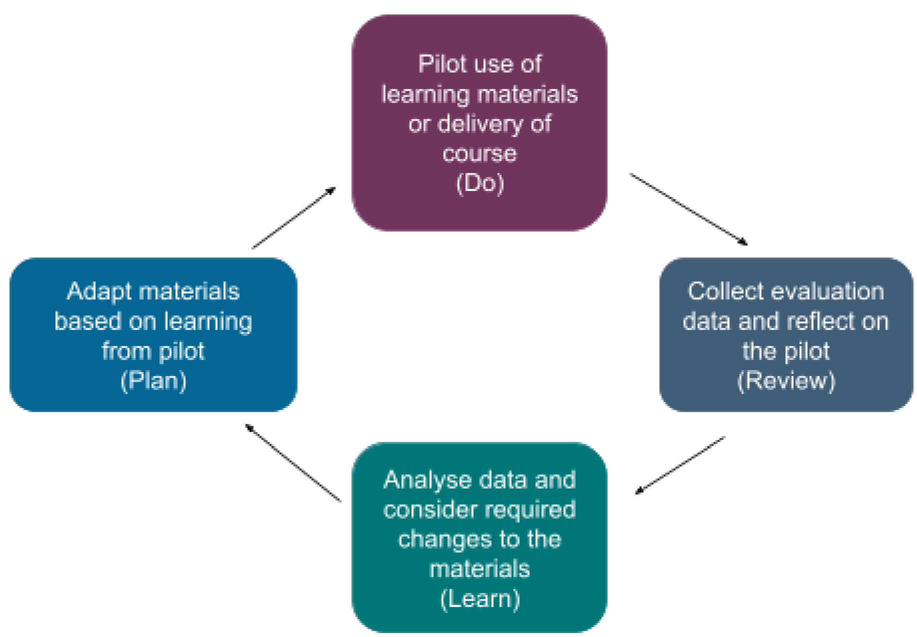
Piloting is the process of testing or experimenting with a product or process, before introducing it more widely. In the context of L&D it is a good way to see how the learning initiative you have designed works in practice, and to identify any changes you might need to make.

Piloting new learning materials can be considered as an experiential learning process in itself, wherein there are four stages which it is helpful to pass through, in order to experience, reflect on, learn from and improve your learning package.

In this note we will:

- Describe a simple process for piloting learning materials;
- Outline key learning and development considerations to factor in to review of new materials.

Pilot process



The best way to test new learning materials is by using them. The pilot process can therefore be seen as an experiential learning process, following the four stages in Kolb's experiential learning cycle (see adult learning theory section), where:

1. Do: Test the materials with individuals from the target audience;
2. Review: Collect feedback from learners, facilitators, L&D colleagues and other stakeholders, as appropriate;
3. Learn: Analyse the data you have collected and identify potential changes to the learning materials;
4. Plan: Adapt the materials based and prepare to deliver again.

Evaluating pilot materials

Evaluating your learning and development activities is good practice and the levels and tools to do this effectively are discussed in our Evaluating Learning section.

For pilots of new learning materials or courses, we suggest adding more to your evaluation approach.

L&D review: If possible, invite your L&D focal point to observe the pilot in full or in part. Specifically, seek their feedback on:

- Whether the sessions met their learning objectives
- Whether the full programme met its overall objectives
- Whether the methodologies were effective, inclusive, engaging and varied
- Whether the activity and course timings were suitable
- Whether key learning points were clear.

Participant feedback: For new learning activities or courses, we recommend asking participants to provide feedback on each session. This is best done as a short activity at the end of each day of training, or after each section of a longer programme. For example, display the session objectives on the wall of the training room, and to close each day ask the participants to mark onto each session whether the objectives were fully, partly or not met, plus any comments.

Facilitator feedback: If you have a team of facilitators, incorporate regular facilitation team meetings into your plans for the pilot course or programme. Use these to discuss what is going well, what is challenging, any feedback on the materials and any proposed changes facilitators would make before using them again. Capture this as you work through the pilot, as it will not be easy to remember everything at the end.

If you are facilitating the pilot alone, keep a feedback log which documents, for each session, what went well, what was challenging, what (if anything) you changed in the materials or design of the session, and any changes you suggest be made before further use.