IMPORTANT INFORMATION FOR THE FACILITATOR

INTRODUCTION

Welcome to this training manual on monitoring and evaluation. This manual has been designed to assist facilitators to train development and nutrition programme managers and those working on nutrition-related activities on how to design a monitoring system and develop an evaluation plan. The training may be conducted in a two-week workshop or through a short course of the same duration. The training is intended to equip participants with knowledge and skills to enable them to plan, conduct and analyse the results of monitoring and evaluation activities and to use them to improve their programmes.

The manual has **7 UNITS** which cover the necessary tasks and information for a programme manager to design a monitoring system and develop an evaluation plan.

Individually, the units can be used to update development and nutrition workers or programme managers on specific skills. For example, if a programme manager or a supervisor realizes that his/her staff require additional information on how to select indicators for a monitoring system, they should refer to Unit 3. Look through the manual to see how it is organized and to get familiar with the contents of each unit.

HOW EACH UNIT IS ORGANIZED

Each unit may have one or more sessions. At the beginning of each unit is a list of sessions and the approximate time they take. Each unit has the following parts:

Unit Title: The unit title and number is given.

Purpose of the Unit: This is a brief paragraph which indicates what the unit is about and why it is important.

Objectives: These reflect the knowledge and skills participants should acquire by the end of the unit. At the beginning of each unit, you should clearly state the objectives so that the participants know what they will be expected to learn. The objectives inform the participants what they should be able to do once learning has taken place.

Unit Overview: An abbreviated list of the key sessions within the unit and the approximate time for each is given.

Time: This is the suggested time that the entire unit should take. Depending on the level of skill the participants have, individual sessions may take more or less time.

Advance Preparation: This tells you what you should prepare before the session. This includes the following:

> **Handouts:** In several of the sessions, there are handouts listed. You will need to make copies of these handouts for each participant.
>
> **Transparencies:** In almost all units, there are transparencies. These need to be prepared in advance of the session.
>
> **Materials:** These are the materials that you need to successfully conduct the training session. If any of these are not available, try to find a substitute. They should be tried out before the session to ensure that they are relevant and suitable.

Procedure: These are the detailed steps in the session which include content, exercises and facilitation techniques. The facilitation techniques that are given are only suggestions and you are advised to adapt any other technique that is more appropriate for your participants.

PREPARING FOR TRAINING

The first thing that ensures a successful start to training is the course preparation that must be done long before the first day of the course. This must be done properly and efficiently. For example, you must have developed the training programme and the training course objectives. Secondly, the administrative arrangements of the training course, such as booking a suitable venue and sending letters of invitation to participants, should have been done in good time. Travel arrangements to the venue should also be properly arranged. As a course organizer and facilitator, it is a good idea to arrive at the training venue ahead of the participants. This will enable you to welcome the participants and give them any information they may need.

CHECKLIST

Here is a checklist with the things you need to do to prepare for the training. Remember that this list is not exhaustive.

Before the Training

Before the training there are a number of activities that you need to organize. The timing for each of these depends on the nature of the activity.

___ Identify training needs

___ Identify number of participants

___ Select dates for training course

___ Make a list of all necessary materials

___ Get quotations for the venue

___ Secure the necessary funding

___ Organize and purchase the stationery and other materials

___ Book the venue

___ Identify and select facilitators, resource persons and special guests

___ Arrange for field visit(s)

___ Send invitations to speakers, resource persons, and special guests

___ Send invitation letters to participants with programme summary and travel arrangements

___ Reconfirm the venue, training facilities, food and accommodation

___ Arrange transportation to and from the venue

___ Arrange for equipment

___ Prepare teaching notes and handouts

___ Plan and organize an opening and closing and press coverage, if necessary

During the Training

During the training, the facilitator has several administrative tasks to perform. Some of these tasks can be delegated during Steering Committee Meetings. These will help to ensure the smooth running of the course. Here is a checklist of some of these tasks.

___ Make sure that all equipment and materials are available and in good working condition

___ Manage and monitor registration, reception, opening and sessions

___ Manage and monitor meals, breaks, special events and closing of the training course

___ File all training course documentation (flipcharts and notes)

___ Prepare participants' address list and distribute

___ Monitor expenses in relation to established budget

___ Reconfirm participants' departure arrangements

___ Optional: Arrange for group photo and press coverage

___ Arrange for daily room clean-up

Team Facilitation

Training is often more fun and less stressful when more than one person conducts the training sessions. If you are training more than 15 participants at one time, you need to have two or three facilitators. However, if co-facilitators and outside resource people are not properly prepared, they can make more work for you. Before the training begins, it is important for co-facilitators to discuss the following issues:

- Who is responsible for what part of the training or session plan?
- Is there a lead facilitator?
- What assumptions does each make about the training?
- If there is a lead facilitator, what assistance does he/she need from the other facilitator(s) during the session?

Ideally, you should use a team teaching approach to present the contents of this training manual. This can be done with co-facilitators and/or occasionally with resource persons. In order to team teach well, it is important for each member of the team to prepare well and present the session plans clearly. As a team, facilitators should be supportive of their colleagues and work together to build a strong team spirit. If possible, involve some of the participants who you feel can assist in the facilitation of some of the training course sessions.

Resource People

Resource people are technical experts you can call on to facilitate a unit or a specific session within a unit. Unlike facilitators they are often not expected to be present for the duration of the training course. If you decide to use resource people or outside experts, you should select people who are qualified, competent and knowledgeable in the areas they will be presenting at the training course. You will need to contact resource people at least one month before the training course and do the following:

- C orient them about your programme, the training course and its objectives;
- C give them the programme, including the unit objectives, timetable, knowledge level and number of participants, and details about the venue;
- C review the session with them, listening to them describe what they are going to do and making sure they understand the importance of keeping with the agenda and its objectives;
- C arrange transport, if necessary;
- C after the training, be sure to send a thank you letter, noting any relevant information from the participants' evaluation.

For team facilitation, you need to plan and prepare the sessions as a group by studying the steps in each procedure and the additional notes for facilitators. The facilitators should agree on which parts of the session each one is teaching. They also need to prepare the flipcharts and handouts for the session.

Overview of the Training Manual

Each unit has experiential activities that address the unit's objectives in a variety of interesting ways. Each activity specifies the purpose, the materials needed, approximate time required, and the steps to follow in each session. Some activities include preparation that must be made prior to the session. Some activities have accompanying Handouts for participants, Transparencies, and Additional Notes for Facilitators; the latter provide supplemental information for you.

To design and conduct a programme tailored to the needs of the participants, you need to do the following:

- familiarize yourself with the entire Training Manual. In particular, consult the suggestions for conducting experiential learning activities and small group discussions. Note the use of additional information for facilitators and the text typed in boldface;
- determine your time frame. The time allocated for each activity is only a guide;
- prepare any handouts or other materials that may be needed before the session begins. If guest speakers are required, make sure they are invited well ahead of time and have been properly briefed as to what you expect;
- introduce each unit of the package by going over the objectives for that

particular unit with the participants.

Many of the activities contained in the Training Manual require no more than pens and Handouts for participants, and board and chalk or newsprint and markers for you. Others require index or manila cards, masking tape, extra paper, scissors, and a basket or a container of some sort. A few activities require a guest speaker or a panel of speakers, so this must be planned well in advance.

Have a 'Question Box' available throughout the duration of the training. Decorate an old cardboard box or other container and cut a slot in the top to insert index or manila cards. Encourage the participants to write any questions they have and assure them that there is no such thing as a 'dumb question.' Giving the participants an opportunity to ask questions anonymously helps ensure that you can address their concerns promptly and appropriately. Make sure you read the questions in the question box daily and reply to them the following day.

FACILITATION TECHNIQUES

Experiential Education

Experiential activities in this programme are designed to help participants gain information, examine attitudes and practice skills. There are structured exercises in which the participants do something and then process the experience together, generalizing about what they learned and, ideally, attempting to apply it to future situations. Experiential learning is participant-centred. You should therefore ensure that you involve the participants by utilizing their knowledge and experiences. While your role as facilitator is crucial, creating the learning experience is ultimately a group responsibility.

One of the ways to make this training successful is to involve the participants in their own education. The fun of working together with participants in experiential programmes is learning how much you can learn from them! Here are some tips for conducting experiential activities:

- Review the unit and activities thoroughly until you feel comfortable with the steps.

- If possible, do a 'dry-run' before introducing a new activity to the group.

- Consider the learning points of the activity and prepare questions to trigger discussion.

- Arrange the room ahead of time to suit the activity, so you do not waste time hanging signs, newsprint or moving chairs. The chairs should be placed in a circle or semi-circle, in front of the board or the flip chart. If space permits, have the participants sit at tables which should be used for note taking, completing handouts and keeping their files or notebooks. Keep one or two in the corner of the room for your supplies and materials.

- Keep an eye on the clock so there is sufficient time for group sharing and discussion.

- Remember, doing the activity is fun, but it is in the processing of the experience that learning takes place.

Specific Techniques

The Training Manual employs a variety of techniques, some of which you may be more comfortable with than others. Do not be afraid to try new techniques. There are many different kinds of activities in the units including role-plays, games, brainstorming, small group work, problem-solving scenarios, and presentations by guest speakers. Here is a brief description of some of them.

VIPP VIPP means Visualization in Participatory Programmes. VIPP involves the use of different shapes of coloured cards so that everything that is done individually and collectively can be visualized, processed, synthesized and shared. VIPP encourages everyone to participate and is based on well-founded theories of adult learning.

Lecturette   A lecturette is a structured and orderly presentation of information delivered by an individual (facilitator). A lecturette can be used to impart knowledge or introduce skills. A lecturette which allows for an exchange between the facilitator and the participants is usually more effective.

Discussions   Discussions are a verbal exchange led by the facilitator or participants about a specific topic or issue in a unit. Through this process, learners have a chance to share facts and ideas and can listen to and consider different points of view. Discussions are useful in both large and small groups. Small groups may offer shy or less verbal learners more of an opportunity to speak. Discussions in the larger group give the facilitator the ability to control the flow of conversation.

Role-plays Role-plays are short dramas in which learners can experience how someone might feel in a situation, try out new skills, and learn from each other. Role playing in small groups or pairs is usually less threatening for participants and allows more people a chance to do it. Ask for volunteers, as many people are embarrassed or uncomfortable to act in front of a large group. After the role-play, be sure to declare the role-play over and ask questions about it.

Case Studies/Scenarios Case studies are stories, either fictional or true, often describing a problem by discussing what a character's options are or how these dilemmas might be resolved. Feel free to adapt any scenarios in the manual so that the exercise better fits the group. Asking the participants to come up with case studies or scenarios using the information from their programmes, sometimes as an assignment, is a good way to ensure realistic situations and language.

Brainstorming Brainstorming is a free-flowing exchange of ideas on a given issue or topic in the unit. You ask a question, pose a problem or raise an issue and students suggest answers or ideas. Write down all the suggestions for the group to see. No editorial comment or criticism is allowed. When the brainstorming is finished, the group evaluates the ideas together, perhaps to identify those they consider most useful or to categorize them in some helpful way.

Guest Speakers/Resource People Guest speakers or resource people can bring a topic or issue in the unit alive by discussing personal experiences and sharing their feelings. You need to identify such people and invite them in good time to the training course. Make sure they are dynamic, knowledgeable about the unit, and comfortable speaking in front of an audience. Prepare the learners for the speaker's presentation so that they know what to expect, are ready with questions, and act respectfully. Prepare the speaker with information about the group and a clear understanding of your expectations.

Games and Exercises Games and exercises are very much a part of the Training Manual. They include such things as introductions, energizers, and warm-ups. These games and exercises speed up and enhance the amount and the quality of interaction in the group. Energizers and warm-ups can be done just before the start of a session, immediately before or after a tea break or lunch, and/or just before the end of the day's sessions.

Questioning Techniques During the presentation of the training sessions, there will be many opportunities for asking and answering questions. Questions can be used to introduce new ideas, to stimulate discussion and to enable participants to pause and think about what they have been learning. The best questions start with the following words: ***who, what, when, why and how***. Encourage the participants to use these words when they are asking each other questions. If for any reason you do not have the answer to a question that the participants ask, you should say so and note that you will look for the answer and give it at a later stage. You may find participants asking questions that are outside the unit. Keep these in mind by writing them down on the flipchart and answer them at a later time.

GETTING STARTED

On the day before the course begins, here are several things to do at the venue:

- arrange the training course room by making sure there are enough chairs and tables for the participants;

- set up the flipcharts and boards for the cards and newsprint;

- put up the timetable for the next day;

- put up flipcharts for volunteers to sign up for:

  administrative issues;
  daily prayers (if appropriate);
  daily evaluation;
  recording of training course proceedings;
  organizing one fun activity at the end of the day;
  energizing the group before or after an activity.

- prepare a workshop folder for the participants including:

  Day 1 timetable;
  Writing materials;
  Information about the venue.

EVALUATION OF THE TRAINING COURSE

There are several ways the training course should be evaluated.

<u>Moodmeter</u>

At the beginning of the training course, prepare a chart called 'The Moodmeter.' The moodmeter is an instrument for the daily, subjective 'measurement' of the mood and atmosphere of the group. It is not directly related to the content of the training course.

Prepare a chart on a newsprint with the total number of days or sessions of the programme written in a horizontal line. In a vertical column, draw at least three different mood symbols, for example, faces showing happiness, indifference or sadness, frustration or anger. Alternatively, temperature indicators such as 15/25/35 degrees can be used. Participants should place an 'X' or a dot in line with the emotion they are feeling at the end of the day or the session. You can draw a line through the dots or 'X's which reflects the group feeling or the 'ups' and 'downs' of the group. This could be used to discuss the energy level of the group or possible success or dissatisfaction.

Flash

Participants and facilitators should stand in a circle. You should ask a direct question to the group, for example, 'Tell me, how did you feel about the day today' or 'What two new things did you learn today.' Each person gives a personal opinion in a very short statement, going round the circle. It is called 'flash' because of the speed in which opinions are given. It should not take more than 30 seconds for each person. No discussion is allowed as the flash is going on.

Evaluation Committee

At the beginning of each day, two or three participants are chosen or volunteer to evaluate the day's events. They may use any technique to gather information from the other learners. Normally, you and the committee meet immediately following the day's sessions, and they carry out their evaluation and present their findings the next morning, immediately before the new session begins. You should always ask the group for comments and respond to any issues that may require your attention.

Final Evaluation

There are several methods of doing a final evaluation of the training course. One way is to convert the 'expectations' and 'concerns' generated at the beginning of the training course into two separate charts of items to be evaluated by the group. The guiding questions to be asked are: 'Were we able to avoid the following concerns;' 'Were we able to accomplish our expectations.' To answer these questions, the participants give an answer for each factor on a scale of one (poorest) to five (best). The points are then tallied and discussed.

Another form of final evaluation is to ask participants to comment on all of the factors to be evaluated at the end of the training course. This would include all of the following among others:

venue/food/accommodation
training course facilities
facilitation
content
outcomes
duration
daily schedule
use of resource people

These factors should be written on newsprint and participants asked to rate them on a scale of 1 (poorest) to 5 (best) and then the points should be tallied and discussed.

Another form of final evaluation is to develop a pre-structured questionnaire to be completed by participants and have the results analysed and shared before the end of the training course. An example of such a questionnaire is found at the end of the manual. It can be used as is, or adapted to meet country-specific situations. If you choose to use it, then make sure there are sufficient copies available for each day that it will be used.

No matter what comes up in the final evaluation, you should never react as if the critique is directed at you personally. Your role is always to ask the opinions of the participants and permit a variety of ideas to be stated. However, you should remind the group to be constructive in their criticism and to look for ways to improve the course.

After the Training Course

Once the training course has ended, your job as the facilitator is not yet completed. There are still course-related activities that you are responsible for. Here is a list of what needs to be done after the training course.

___ Meet with other facilitators on the team to discuss problems and successes and give general feedback

___ Pay final bills, closing accounts as necessary

___ Send thank you letters to all those who helped with the training course

___ Draft, edit, and reproduce final report and recommendations

PREPARING THE FINAL REPORT FOR THE TRAINING COURSE

The final report is a record of what happened during the training. It is a useful document. It should be used as a reference to plan for future training courses. It is a good idea to divide the parts of the report that need to be written amongst the members of the training team. As the course leader, it is your responsibility to put the entire report together and distribute it to the other team members, your immediate superiors, headquarters staff and donors as well.

Here is what should be included in the final training course report:

Cover
Title page
Acknowledgments
Table of Contents
List of Abbreviations

Background information
Training course objectives
Summary of sessions
Analysis of training course evaluation
    (Views of participants and facilitators)
Recommendations
Appendices
    Appendix 1: Course timetable
    Appendix 2: Opening and closing speeches
    Appendix 3: List of participants and their addresses

COURSE ORIENTATION

PURPOSE OF ORIENTATION

The purpose of this unit is to get the workshop off to a good start by having participants introduce themselves and to get to know one another. The unit also explains the objectives of the workshop. In one session, the workshop methodology will be explained and participants will have the chance to express their expectations and concerns. Any administrative matters will also be handled at this time.

OBJECTIVES

By the end of this orientation, participants should be able to:

- name their fellow participants;
- discuss their expectations and concerns;
- explain the objectives and purpose of the workshop;
- explain the workshop methodology;
- discuss the administrative and housekeeping arrangements.

ORIENTATION OVERVIEW

Session 1: Word of Welcome (15 minutes)

Session 2: Introductions (90 minutes)

Session 3: Workshop Expectations and Concerns (30 minutes)

Session 4: Workshop Objectives (30 minutes)

Session 5: Workshop Methodology (45 minutes)

Session 6: Administrative and Housekeeping Matters (45 minutes)

TIME

4 hours 15 minutes

ADVANCE PREPARATION	Prepare and photocopy handouts and make the transparencies. Ensure all materials are available.

Handouts:	II.1	Facilitation Techniques
Transparencies:	II.1	Overview of the Workshop Programme
	II.2	M&E Training Workshop Objectives
Materials:	writing pads, pens, VIPP cards, flipchart, masking tape, markers, pins, brown paper, glue, overhead projector, overhead transparencies, transparency pens	

PROCEDURE

Session 1 Word of Welcome . . . . 15 minutes

Step 1: Begin this session by officially welcoming participants to the workshop. If there is an outside guest, invite him/her to speak.

Step 2: Give a brief overview of the workshop and the programme. Use **Transparency II.1** to give an overview of the workshop programme.

Session 2 Introductions . . . . 90 minutes

Step 1: Explain to participants that since they will be together for the next two weeks, it is important to get to know each other, their interests, likes and dislikes.

Step 2: Divide the group into pairs of people who do not know each other well. Ask the groups to find a place in the room where they can interview each other. The interview should take about 5-10 minutes. Each person should find out the following about their partner:

name;
from where;
work he/she does;
what name he/she would like to be known by in the workshop;
likes/dislikes;
experience in monitoring and evaluation;
an adjective that describes the person.

Step 3: When participants have finished interviewing each other, ask for a volunteer to introduce his/her partner. Do this until everyone has been introduced. As each person is being presented to the group, write their dislikes on the flipchart and use them at the end of this session to help build group norms. The facilitator has the opportunity when the introductions are going on to ask for more information and to encourage participants to find out more about each other. Each presentation should not last longer than 3 minutes per person.

Step 4: At the end of the introductions, remind participants to find out more about each other during nutrition breaks, over meals and during their free time.

Session 3 Workshop Expectations and Concerns . . . . 30 minutes

Step 1: Explain to participants that one of the facilitation techniques that will be used during the workshop is known as VIPP. VIPP stands for Visualization in Participatory Programmes. Point out that VIPP makes use of coloured cards of different sizes and shapes. Go over the following rules for writing on the cards:

> Think before you write;
> One idea per card;
> Key words only;
> Write legibly—should be seen from 8m away;
> No more than three lines per card;
> Use upper- and lowercase letters;
> Write across the card, not vertically;
> Follow the colour, shape and size code.

Step 2: Hang up three cards: Professional Expectations, Personal Expectations, and Concerns. Give participants three sets of cards and ask them to write their professional and personal expectations and concerns about the workshop on the different coloured cards and then to hang them under the correct heading. Ask participants to write one idea per card, but to write as many cards as they need.

Step 3: Ask for one or two volunteers to read the cards under professional expectations. When all the cards under that heading have been read, ask for a volunteer to synthesize what the cards are saying and pull out any cards that repeat what has already been said. Do the same for personal expectations. Encourage the participants to discuss and question each other's expectations.

Step 4: Ask for a volunteer to read the cards under concerns. Synthesize their ideas. Encourage participants to explain why they have such concerns and what they think should be done to allay these concerns.

Session 4 Workshop Objectives . . . . 30 minutes

Step 1: Explain to participants that as the organizers of the workshop, you tried to anticipate what professional expectations participants might have and, on that basis, you developed the workshop objectives.

Step 2: Display **Transparency II.2** with the workshop objectives on it. As you present the objectives of the workshop, compare them with their