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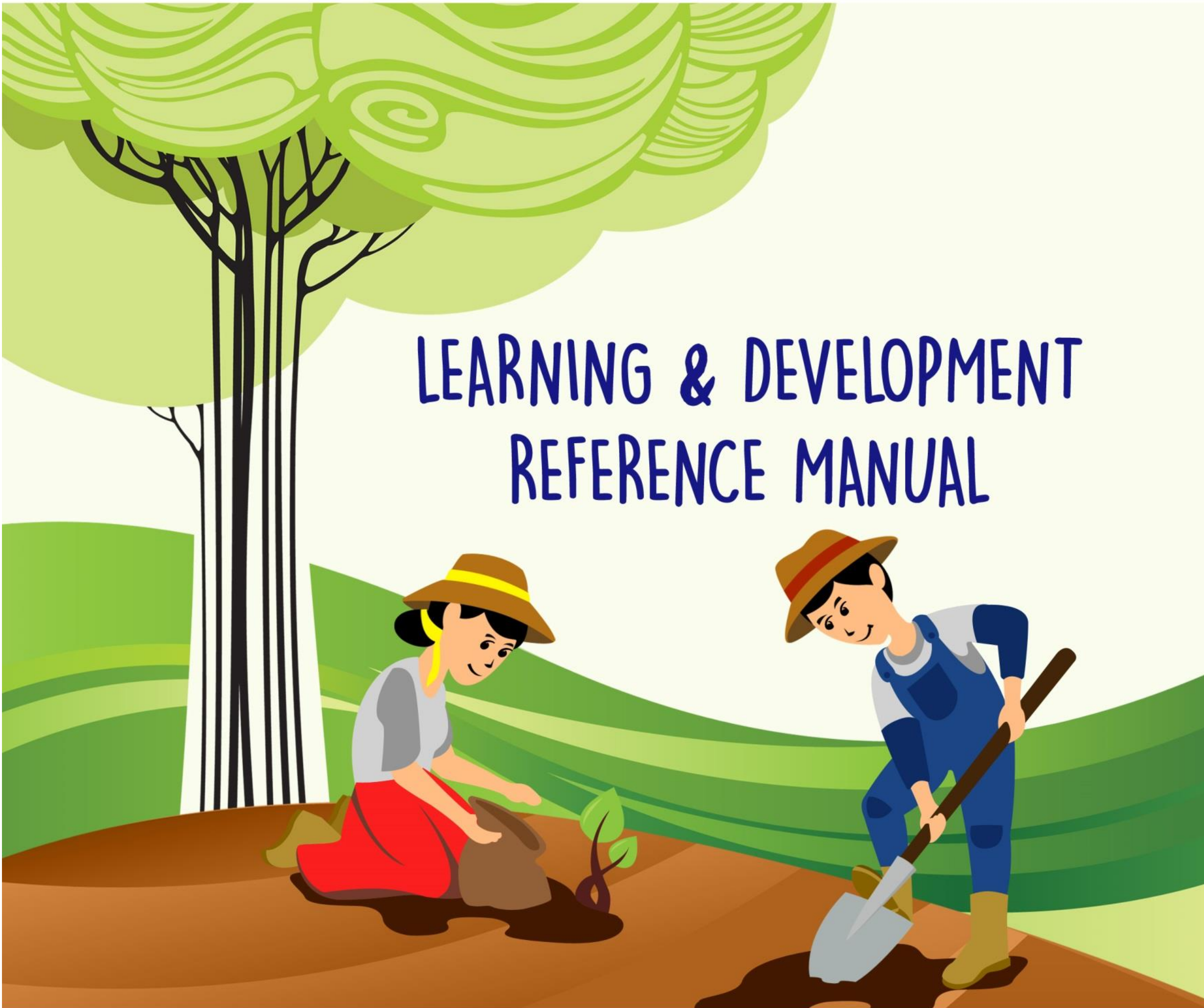
PROVINCE OF DAVAO DEL NORTE · OFFICIAL SEAL · 1967

LEARNING & DEVELOPMENT REFERENCE MANUAL



Learning & Development Reference Manual

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RODOLFO P. DEL ROSARIO
Governor

Foreword

The Provincial Government of Davao del Norte has put in place innovative human resource policies and standards in line with our administration's reform agenda to empower our most important resource and fuel good governance. Through the support of the Philippines Australia Human Resource Organizational and Development Facility (PAHRODF), we have implemented our new Human Resource Development Plan (HRDP) that enabled us to carry out strategic and competency-based HRD interventions. We have effectively refocused our function from giving transactional services to a transformational role.

With the changing nature of work and office environment, it is important to hone the skills and knowledge of our personnel to become more adaptive, flexible, and forward-looking. Learning and development is, therefore, a very important means in optimizing the utilization of the human resource, particularly in achieving organizational goals while pursuing the staff's individual goals.

Hence, this strengthened Learning and Development Management System contained in this Manual is a basic and critical HRD tool that covers the over-all approach, specific processes, and the detailed procedures on how to develop our talents. It also serves as a guide for HR practitioners in their efforts to nurture and help develop the necessary knowledge, skills and attitudes needed in building a strong and self-reliant local government. Hence, I enjoin our HRD stakeholders to use this Manual, as a basic guide and reference for the right intervention and growth of our personnel.

I reiterate my administration's commitment to continue investing on our people. The advent of global economy has prompted a paradigm shift in the role of the local government unit from being a service provider to that of a maker of an enabling environment for our communities to grow and prosper. Thus, we are equipping our human resource with the vital competencies to empower them to excellently deliver basic services that is crucial in attaining inclusive balanced progress.

RODOLFO P. DEL ROSARIO
Governor

INTEGRITY • COMPETENCE • COMMITMENT

INTRODUCTION

The Learning and Development Reference Manual is one of the outputs of the Strengthening Management of Provincial Government of Davao del Norte's (PGDdN) Human Resource Learning and Development Services Project, funded by Australian Government through the Philippines-Australia Human Resource and Organisation Development Facility (PAHRODF). This intervention continues the process of strengthening the Human Resource Development (HRD) function of the Provincial Human Resource Management Office (PHRMO), following the HRD planning intervention undertaken in 2014 with assistance from PAHRODF.

The Reference Manual captures the key experiences and learning of the PGDdN pool of learning facilitators who were trained during the intervention. It will serve as a useful reference and guidebook for the pool of facilitators and other learning & development (L&D) practitioners. The Reference Manual will provide L&D facilitators and practitioners with comprehensive, concise guidelines in designing and implementing the interventions identified in PGDdN's HRD Plan.

With the use of this reference manual, PGDdN's L&D initiatives for both employees and other stakeholders will be effective, responsive, and enjoyable.

The Overview of Learning and Development, as discussed in Chapter I, provides the fundamental concepts of the learning process, in accordance with principles and processes provided in the Civil Service Commission's (CSC) Program to Institutionalize Meritocracy and Excellence in Human Resource Management (PRIME-HRM). Chapter II describes the different learning interventions used during this project for the PGDdN. The succeeding chapters discuss the methodology of instructional systems design (ISD) and administrative procedures which were followed during the learning sessions of the intervention, and expand the L&D management system described in the HRD Learning and Development Systems Manual, another output of the project.

Each chapter discusses each phase of the learning methodologies used during the intervention and provides its:

1. **Purpose:** providing the rationale why this particular process is important and relevant to the implementation of a Learning intervention.
2. **Principles**: providing the theories, concepts and principles that make the implementation of the process effective.
3. **Process**: the step by step procedural flow together with simple guidelines on how the process should be undertaken.
4. **Templates**: providing sample reports, forms and other documentations that will enable participants to prepare the expected outputs of the intervention.

ACRONYMS

4 A's	Activity, Analysis, Abstraction, and Application
ADDIE	Analyse, Design, Develop, Implement, and Evaluate
CSC	Civil Service Commission
FGD	Focus Group Discussion
GROW	Goals, Reality, Options, Wrap up
HRD	Human Resource Development
HRDD	Human Resource Development Division
ISD	Instructional Systems Design
L&D	Learning & Development
L&DNA	Learning & Development Needs Analysis
LNA	Learning Needs Assessment
LSP	Learning Service Providers
M&E	Monitoring & Evaluation
MOL	Methods of Learning
PAHRODF	Philippines Australia Human Resources and Organisation Development Facility
PHRMO	Provincial Human Resource Management Office
PRIME-HRM	Program to Institutionalize Meritocracy and Excellence in Human Resource Management
PGDdN	Provincial Government of Davao del Norte
SMART	Specific, Measurable, Attainable, Results-focused, Time-bounded
SP	Sangguniang Panlalawigan
TNA	Training Needs Analysis

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CHAPTER 1

OVERVIEW OF LEARNING & DEVELOPMENT

1 OVERVIEW OF LEARNING & DEVELOPMENT

Learning & development (L&D) is "a function of human resource management concerned with organisational activity aimed at bettering the performance of individuals and groups in organisational settings." It is a critical function because it enables the organisation to achieve strategic objectives by having competent and committed employees. The L&D function harnesses the innate talents of employees and develops these to enable individuals and groups to perform their jobs well, and to maximise their potential for learning and growth.

This Reference Manual will help L&D facilitators achieve the following:

1. L&D interventions in PGDdN are based on identified and verified needs that are directly aligned to the organisation's goals and objectives. These needs are identified and described in PGDdN's HRD Plan (2014).

2. L&D interventions are deliberately and systematically designed, developed, implemented and evaluated, in accordance with the standards found in the PRIME-HRM system of the Civil Service Commission.

3. L&D practitioners in PGDdN are well coordinated, competent, and consistent in the conduct of L&D interventions.

THE LEARNING AND DEVELOPMENT PROCESS

The L&D process is cyclical, wherein the results of one activity are an input to another activity. The cycle emphasises that the process is one of continuous improvement and revisions, based on the results of each phase of the intervention.

This process is described fully in the table on the next page in terms of the activities and the person(s) responsible for each activity.

The overall L&D process for PGDdN consists of the following activities:

Process Flow	Responsible Person	Details
Review Organisational Needs	PHRMO Head	Review and prioritise needs together with key stakeholders (Department Heads, Sangguniang Panlalawigan (SP))
Develop HRD Plan	Supervising Administrative Officer	Develop HRD Plan/curriculum based on priority organisational needs subject to validation and approval of key stakeholders
Conduct Learning Needs Analysis	Administrative Officer	Conduct Needs Assessment to identify relevant programs based on performance, learning and environmental needs
Design and Develop Interventions	Administrative Officer	Translate learning needs into learning objectives. Source, select and sequence content. Develop course materials.
Implement HRD Plan	Supervising Administrative Officer	Schedule program/ course implementation based on priorities and number of target participants.
	Supervising Administrative Officer	Assign Administrative Officer as L&D Administrators and Facilitators to implement programs/ courses as scheduled.
Conduct Evaluation	Administrative Officer	Conduct L&D evaluation in accordance with the M&E plans specified in program/ course designs.

The process flow shown above can be viewed in terms of a hierarchy of needs and how the different needs are addressed by the outputs of the different stages of the L&D process.

The figure below depicts the relationship between the different types of need or deficiency and the levels of outputs produced by the L&D process, as well as the levels of evaluation for each type of need and output.

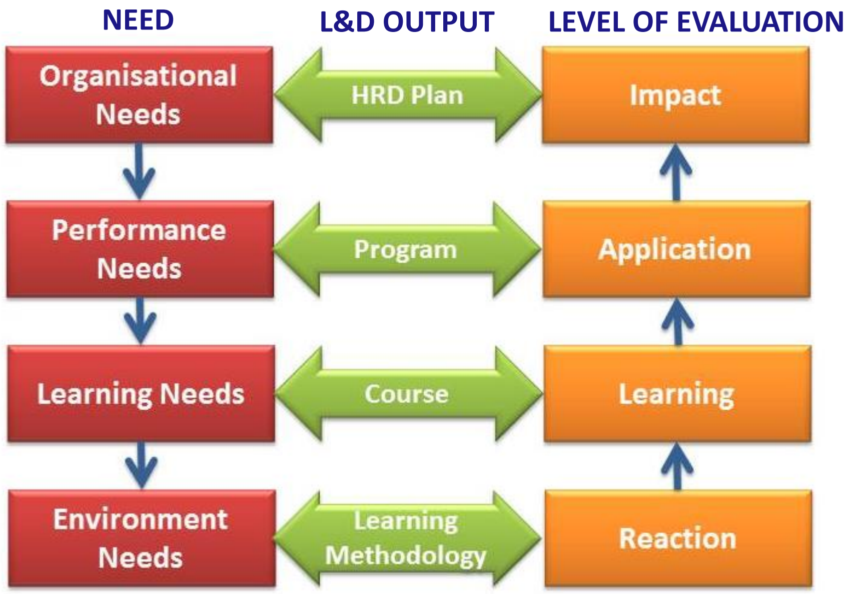


Figure 1: Congruence of Needs and Evaluation Levels

As the organisational, performance, learning and environment needs are aligned, these can be related to how the L&D intervention will be implemented. Organisational needs can be addressed by developing an L&D Plan that specifies how the different stakeholders in the organisation will be trained and developed to enable them to achieve desired results. Performance needs can be addressed by providing Programs and Courses that develop specific competencies needed to improve performance. Learning needs are addressed by achieving Learning Objectives through the Course Content that will build the competencies. And, Environment needs are addressed through the methods of facilitation and other techniques to make the learning environment positive and encouraging.

The different needs are determined through different levels of needs analysis. Organisational needs are uncovered through the process of strategic planning and organisational needs assessment, when organisational results are compared with strategic objectives. Performance needs are determined through performance analysis by comparing the desired and actual performance of employees through a competency assessment. L&D Needs Analysis (L&DNA) will disclose the individual learning needs of an identified group of learners. However, L&DNA is done only if it is determined that L&D is the solution to the performance issue or need. The process of determining an L&D need is referred to as Learning Needs Assessment (LNA).

LEARNING & DEVELOPMENT NEEDS ASSESSMENT

L&D needs assessment is done to determine the causes of a performance/competency gaps, and whether an L&D intervention is necessary and appropriate to address the gap.

Training as an L&D intervention is appropriate when the performance issue is a “can’t do” issue –Poor performance resulting from a knowledge or skill deficiency.

- Lack of basic skills (reading, writing, analysing, math skills).
- Legislation or policies requiring new knowledge or skills are introduced.
- New technology is introduced
- A customer requests for new products or services.
- Higher performance standards are set.
- Employees are given new jobs.

COMPETENCY ASSESSMENT

- A systematic process of assessing competencies through a series of activities and exercises which simulate the typical work challenges of target group
- Performance in the activities is observed and assessed
- A candidate’s level of Competence is measured against an ideal/ standard competency profile

FUNDAMENTAL CONCEPTS IN LEARNING AND DEVELOPMENT

L&D interventions are varied and can take many forms, using different delivery modes. This manual discusses primarily the use of training or instruction as an L&D intervention, or as an approach to facilitating learning among a group of people.

The processes explained in this manual follow basically Instructional Systems Design (ISD), but the principles, processes and activities contained here apply just as well to other L&D interventions, such as coaching and mentoring. Benchmarking as an L&D method is also included in this manual.

The framework below shows the L&D cycle as part of the L&D management system.

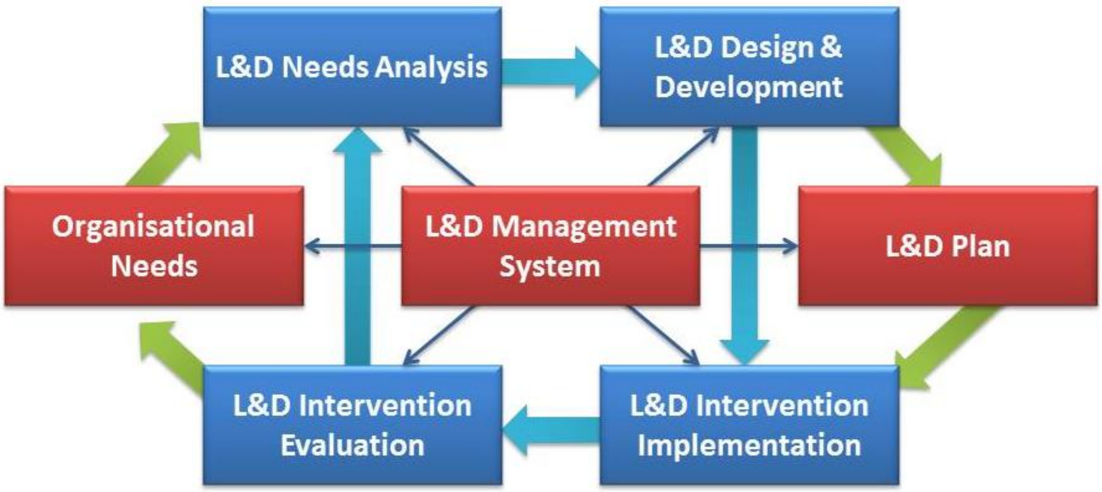


Figure 2: L&D Framework

The components of the framework are as described as follows:

Organisational Needs are the primary reason for providing L&D in an organisation. Identified individual needs must be aligned to organisational needs. Without aligned individual and organisational needs, L&D efforts will not have the desired impact on organisational performance and results.

L&D Plan ensures that L&D interventions are prioritised according to the needs of the organisation and are scheduled and implemented according to such priorities. PGDdN's HRD Plan provides the list of L&D interventions and prioritises these interventions.

Learning and Development Management System ensures that all components that contribute to Implementing learning interventions are aligned with each other and are well coordinated. The system ensures that the output of one component, for example *L&D Needs Analysis*, is a significant input to the succeeding component which is *L&D Design and Delivery*. The bigger the organisation, the greater the need to manage the learning and development system.

The different phases of the L&D cycle: **Needs Analysis, Design and Development, Delivery** and **Monitoring & Evaluation** are all stages of the process of designing and implementing an L&D intervention. These are discussed further in the section on L&D Intervention Design.

The L&D Management System requires that a unit exists to manage the learning and development processes in PGDdN, and that the Human Resource Development Division (HRDD) oversees the L&D system, including the implementation of PGDdN's HRD Plan.

60-30-10 Rule

In managing the L&D system, HRDD will observe the 60-30-10 rule as stated in PHRMO's HRD Plan.

1. 10% is learned from formal classroom L&D and education
2. 30% is learned from coaching or feedback from peers
3. 60% is learned from experience

Given this rule, the L&D Plan of PGDdN should implement not only the formal classroom type of interventions, but also a wide range of other learning interventions. People can learn from peers if given the opportunity to do so, such as establishing and maintaining communities of learners physically or virtually. Learning from experience can be made more purposive through the use of: mentoring and coaching; learning journals; meetings and general assemblies; action learning; and, open space technology.

ADULT LEARNING PRINCIPLES

The L&D processes and procedures contained in this manual follow adult learning principles which are important because they ensure that any L&D or learning interventions will be relevant and effective. These principles should guide the L&D facilitator in designing and implementing any L&D activity.

1. Adults are internally motivated and self-directed.
2. Adults bring life experiences and knowledge to learning experiences.
3. Adults are goal-oriented.
4. Adults are relevancy-oriented.
5. Adults are practical.
6. Adult learners like to be respected.

Adults learn best when they understand why the L&D or any part of it is important to know or do. Their learning preferences should be considered in the design. L&D activities should emphasise the use of experience, and should design activities that apply what is learned. If the L&D intervention is in the form of classroom learning (otherwise known as "training"), care should be taken that the environment is positive, supportive and encouraging.

DESIGNING L&D INTERVENTIONS

Instructional systems design (ISD) is the process of designing a specific learning intervention or activity, and developing instructional courses or materials that bring greater efficiency and effectiveness to acquiring knowledge or skills for learners. The different stages of design are shown in the model below, generally referred to as the ADDIE model.

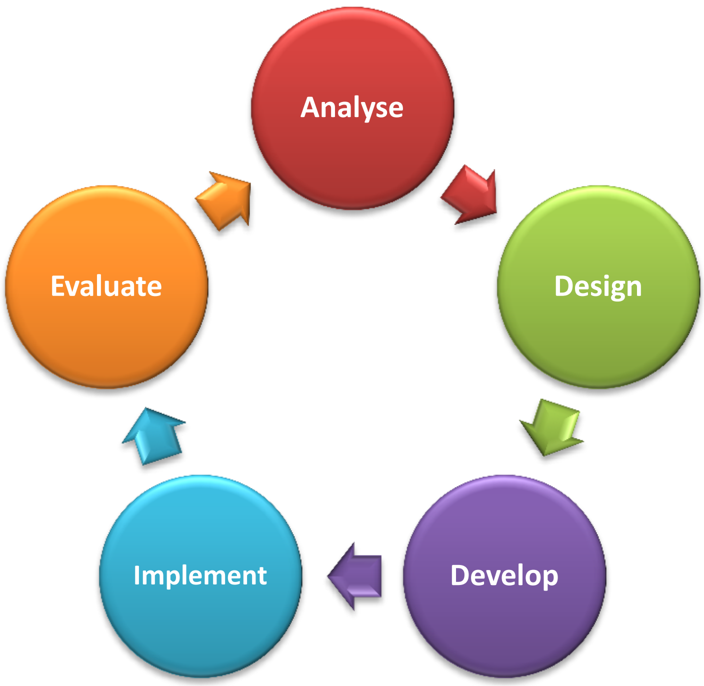


Figure 3: ADDIE Model

ADDIE MODEL

1. ANALYSE

A Learning Needs Analysis and a Needs Assessment are included in this phase which serves as the foundation for the learning process. The following questions[1] are asked for this phase:

- Is the performance problem an L&D problem?
- How will implementing a learning platform positively impact a business need or goal?
- What must the learners be able to do in order to ensure the required change in performance?

2. DESIGN

The L&D intervention is systematically organised in this phase. The question for design is "What must be learned by the learners that will enable them to fulfil the required business need or goal?" An L&D design matrix would need to be completed. It contains the following key outputs: learning objectives, session objectives/ activity, expected outputs, learning methodology, facilitator/ resource person, and resources needed

[1] Clark, D.R. (2014)

3. DEVELOP

In the Development phase, the L&D design matrix is completed. For this phase, “What activities will best bring about the required performance?”
The 4 A’s: Activity, Analysis, Abstraction, and Application, are considered before completion (this is further explained under L&D Delivery & Facilitation, specifically in Kolb’s Experiential Learning Cycle).

4. IMPLEMENT

The fourth phase, Implementation, asks “Have the learners now become performers (have the skills and knowledge to perform the required tasks)?”
It is during this phase that the L&D design matrix is implemented and tested.

5. EVALUATE

In the Evaluation phase, formative evaluation is made during the first four phases (specifically on learning materials, student learning and achievements, and teacher effectiveness[2]).
A summative evaluation is also done during this time to assess the program’s Level 1 effectiveness.

[2] Clark, D.R. (2010)

CHAPTER II

LEARNING & DEVELOPMENT NEEDS ANALYSIS

11 LEARNING & DEVELOPMENT NEEDS ANALYSIS

PURPOSE

L&D Needs Analysis is conducted to ensure that:

- Learning interventions directly address the relevant needs of the organisation by identifying organisational needs, performance needs, learners' needs, and learning environment needs
- Learning interventions address the root causes of performance gaps
- Designs of learning interventions will focus on the causes of performance gaps and will build the competencies needed to fill those gaps
- Designs are appropriate for the identified target group and learning methods will be effective for the group

L&D Needs Analysis is conducted on two levels: Learning needs assessment/ analysis and training needs analysis (TNA). Learning needs assessment involves organisational performance assessment with learning needs analysis as "a study of the types of training needed by an organization's employees[3]", whereas training needs analysis is done when a specific learning need is identified.

[3] Training Needs Analysis (n.d.).

PRINCIPLES

ADULT LEARNING PRINCIPLES AS APPLIED TO LEARNING NEEDS ANALYSIS

	Young Learner	Adult Learner
What to Learn	Decided by Teacher	Decided by Learner
Source of Learning	Teacher	Facilitator and Learner
Readiness to Learn	Function of Age	Perceived Need
Learning Orientation	Subject-centered	Life-centered, Task-centered, Problem-centered
Motivation to Learn	External Motivation	Internal Motivation

QUESTIONS ADDRESSED BY THE TNA

Once it is determined that training or a learning activity is the intervention needed to address the performance or competency gap, training needs analysis (TNA) must be undertaken. This process answers the following questions:

Questions	
WHY	Reason for conducting the TNA
WHO	Who are the stakeholders? What are their roles?
WHAT	What information is needed? What are the sources of information?
WHEN	When will the information be gathered? How often?
HOW	How will the information be gathered, measured and analysed?
HOW WELL	What are the sign posts that the TNA is successful? (Success indicators)

FIVE STEPS OF TNA

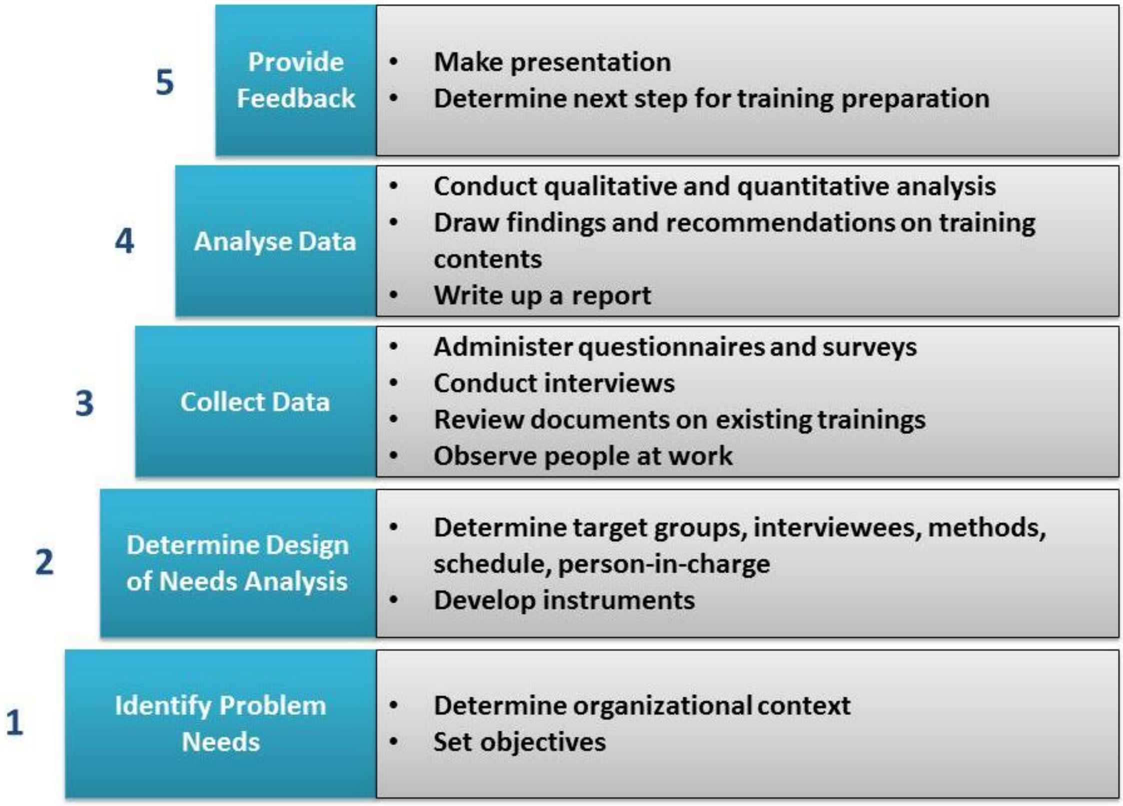


Figure 4: 5 Steps of TNA

STEP 1

SETTING OBJECTIVE(S) OF THE TNA

The results of the TNA are formulated into TNA objectives, which can be any of the following:

THE TNA IS CONDUCTED TO:

- Address a current problem
- Avoid past or current problem
- Prepare for future opportunity
- Adapt to change
- Promote learning, development or growth

THE TNA OBJECTIVE ANSWERS THE QUESTIONS:

- Why are we doing a TNA?
- What do we want to achieve in doing the TNA?

EXAMPLE:

From the Training Needs Analysis Report of the Problem Solving Group:

This TNA seeks to achieve the following objectives:

- *Identify the L & D topics to be provided to the participants based on the TNA result*

STEP 2

DESIGNING THE TNA

WHAT IS A TNA DESIGN?

The TNA Design answers the questions

- Who are the stakeholders of this TNA?
- What information do we need?
- How will data be gathered?
- How will data be analysed?

Figure 5: Designing the TNA

WHO ARE THE STAKEHOLDERS?

Stakeholder analysis is a starting point for understanding the change readiness of key stakeholder groups. By understanding the requirements, and readiness gaps of key stakeholder groups, we are better equipped to plan and implement appropriate change interventions.

A stakeholder is:

- Anyone who is impacted by or who impacts/ influences the change
- Person, group or institution with interest in the change/ intervention
  - Who will be ultimately affected, either positively or negatively
  - Who can significantly influence or are important to the success of the change intervention
- Can be an individual or a group of individuals with similar stakes in the change

STEP 3

DATA GATHERING

The L&D needs analysis process involves the gathering of data to identify the learners and determine the scope and extent of their need for L&D. There are several sources of the data needed to understand the learners' L&D needs. Some tips in gathering data for both learning needs and training needs analysis are:

1. Consult Organisation Heads to gather organisation needs and at the same time get their buy-in on the resulting interventions.
2. Compare Competency Models with Performance Gaps.
3. Look for recurring issues and significant patterns from L&D evaluation and participant comments.
4. Be observant during data gathering activities.

During the TNA, data gathering follows the process below:

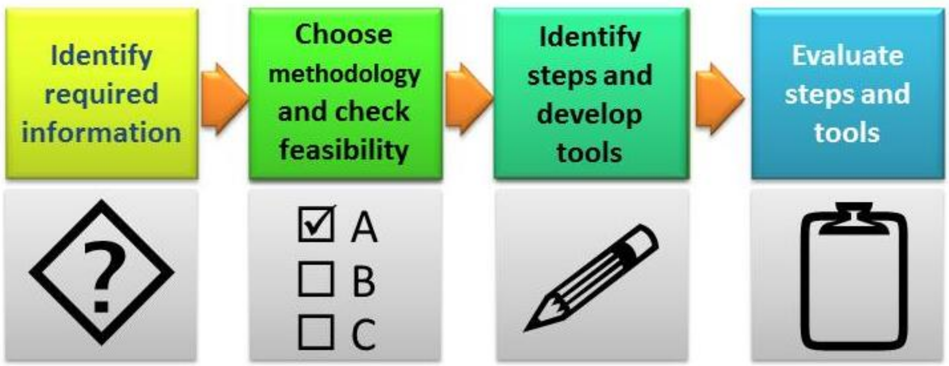


Figure 6: Data Gathering

SELECTING DATA GATHERING METHOD

Target group	Data gathering method
Office staff	TNA Questionnaire, followed by FGD
Shop floor technicians	Observation, performance report
Salespeople	Performance, customer feedback, TNA
Executives	Assessment Centre, Key Informant Interviews

Some data gathering methods are:

I. INTERVIEW

The interview is a common method of gathering information. It can be structured or semi-structured in nature.

Structured	Semi-Structured
• Interviewers read the questions as they appear on the questionnaire • Same questions are asked the next interviewee, in the same order • Choice of answers is fixed (yes/no; multiple choice) • May also include open-ended question • Answers can be reliable aggregated and comparisons can be made between sub-groups	• Focused on identified topics • Possible relationships between topics/ issues is looked out for and this becomes the basis for more specific questions • Allows for probing; flows lie a conversation • New questions can arise based on responses of Interviewee

2. FOCUS GROUP DISCUSSION

The FGD is a qualitative research method with the purpose of obtaining in-depth information on the ideas and perceptions of a group and also to expand the group interview to be more than a question-answer interaction.

It is a relatively small meeting (generally 6-12 participants) convened for a specific purpose under the direction of a facilitator, during which group members talk freely and spontaneously about a certain topic.

STEPS IN FGD

Figure 7: Steps in FGD

3. QUESTIONNAIRE

The questionnaire is a type of interview on paper. It's useful in obtaining a "big picture" of what a large number of employees think.

PROS	CONS
• Inexpensive and can collect data from a large size or number of people in a relatively short time	• Provides limited information • May raise possible anonymity and confidentiality concerns

TIPS FOR INTERVIEWS

BEST PRACTICES: CONDUCTING THE INTERVIEW

- Begin with rapport building statements/questions
- Obtain permission to record the interview
- Avoid adhering to the set sequence. Be flexible but ensure that all questions are asked
- Give all participants equal amount of time to respond to questions Clarify responses when necessary
- Ask for concrete examples to support statements
- Separate facts from opinions
- Maintain a neutral attitude
- Avoid discussing results with other Interviewees
- Ask whether Interviewee has questions offer appreciation for participation
- Summarise key points

TYPES OF INTERVIEW QUESTIONS

Type of Question	Purpose
Opening questions	To identify the characteristics that the participants have in common. Participants should be given an opportunity to introduce themselves
Introductory questions	To introduce the general topic of the discussion, and to stimulate the conversation, and improve interaction in the group
Transition questions	To move the participants into the focus of the discussion
Key questions	Concern about the focus of the interview
Ending questions	Give the participants an opportunity to make final statement
Final questions	Ask the participants to add things, they think have not been considered during the discussion

TIPS FOR QUESTIONNAIRES

1. Identify the goals of the questionnaire
2. Determine your sample (identify whom you will distribute your questionnaires to)
3. Create your questionnaire. Start by identifying the types of questions you will use such as:

    a. Open-ended Questions (ex. What would you like to learn about Partnership and Networking?)
    b. Close-ended Questions (ex. How many trainings have you facilitated in your work? Choices are: a. 0; b. 1; c. 2-3; 5 and more)

For other types of questions, please visit
http://www.socialresearchmethods.net/kb/quesresp.php
http://www.socialresearchmethods.net/kb/questype.php

STEP 4

DATA ANALYSIS

Data analysis is the process of organising, consolidating, and analysing the data gathered during the TNA data gathering phase.

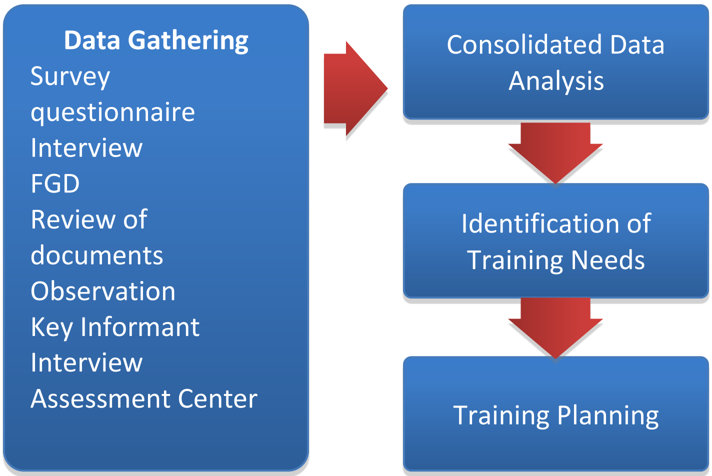


Figure 8: Data Analysis to Training Planning

It consists of several tasks:

1. **Data Preparation** – Cleaning and organizing the data for analysis
2. **Descriptive Statistics** – Describing the sample using summary statistics
3. **Testing Hypotheses and Models** – using inferential statistics to address specific research questions or hypotheses

There are two types of data analysis – quantitative analysis and qualitative analysis. Quantitative data analysis involves the analysis of numerical data, whereas qualitative data analysis examines the range of processes and procedures to reach or obtain an explanation, understanding or interpretation of descriptive data.

The different characteristics of each type of analysis are shown below.

QUANTITATIVE	QUALITATIVE
The aim is to count, classify features, and construct statistical models in an attempt to explain what is observed	The aim is complete, detailed description
Objective – seeks precise measurement & analysis of target concepts, e.g., uses surveys, questionnaires etc.	Subjective – individuals' interpretation of events affects the analysis ,e.g., uses participant observation, in-depth interviews etc.
More easily divided into discrete stages of instrument development, data collection, data processing, and data analysis	Data collection and data analysis are not temporally discrete stages: as soon as the first pieces of data are collected, the evaluator begins the process of making sense of the information
Data is more efficient, able to test hypotheses, but may miss contextual detail	Data is more 'rich', though time consuming, and not easily generalised

ANALYSING QUALITATIVE DATA

- The major characteristic of analysis of qualitative data is that we analyse it IN WORDS, rather than in numbers.
- Qualitative data from other sources than open-ended questions require more elaborate coding and compilation techniques
- Useful to summarise qualitative data in compilation sheets, diagrams, flow-charts, or matrices

TWO TYPES OF QUALITATIVE DATA

- Answers to open questions, and
- More elaborate narratives from loosely structured interviews or FGDs.

STEPS IN UNDERTAKING QUALITATIVE ANALYSIS

1. Data Reduction

- This refers to the process whereby the mass of qualitative data obtained – interview transcripts, field notes, observations etc. – is reduced and organised, for example coding, writing summaries, discarding irrelevant data and so on.
- At this stage, all irrelevant information is discarded but should be available for future reference, as unexpected findings may require re-examining some data previously considered unnecessary.

2. Data Display

- An organised, compressed assembly of information that permits conclusion drawing

- A display can be an extended piece of text or a diagram, chart, flowchart or matrix that provides a new way of arranging and thinking about the more textually embedded data
- Allows the analyst to extrapolate from the data enough to begin to discern systematic patterns and interrelationships

3. Conclusion Drawing and Verification

- Conclusion drawing involves stepping back to consider what the analysed data mean and to assess their implications for the questions at hand
- Verification, integrally linked to conclusion drawing, entails revisiting the data as many times as necessary to cross-check or verify these emergent conclusions

ANALYSING QUANTITATIVE DATA

Some useful concepts and tools in quantitative analysis are the following:

1. **Distribution** – summary of the frequency of individual values or ranges of values for a variable

   Frequencies (Counts) – number of times that a particular value appears in a distribution of scores

   (Using Microsoft Excel)
   =FREQUENCY(ARRAY, VALUE)
   =FREQUENCY(A1:A10,2)

   Percentage – frequency divided by total sample times 100

2. **Central Tendency** – estimate of the "centre" of a distribution of values, to represent the “typical” response or value

   Measures of Central Tendency
   - **Mean:** $m_x = (\Sigma x)/n$
     – Add up all the values, then divide by the total number of cases or respondents
   - **Median:** middle attribute in the ranked distribution of observed attributes
     – 50th percentile
     – rank the observations and the 0.5*(N+1)th observation in order is the median
   - **Mode:** the most frequent observation

3. **Dispersion** - refers to the spread of the values around the central tendency

   - **Range** – distance between Maximum and Minimum (how spread apart the responses are within the sample)
   - **Standard deviation** – indicates how varied/different the responses are from the sample mean.

GUIDELINES IN DATA ANALYSIS

- Start the analysis right away and keep a running account of it in your notes
- Involve more than one person
- Leave enough time and money for analysis and writing

WHEN TO THINK ABOUT DATA ANALYSIS

- When designing the study
- When planning for data collection
- When data has been gathered
- When the report is being written and reviewed

At the Planning Stage	During Data Analysis	When Interpreting results
• Be clear about the objective of needs analysis • Understand the subject matter • Develop an analysis plan • Coordinate analysis plans with data collection – sources of information – method of collection	• Check the data for accuracy and completeness • Review the analysis method for appropriateness • Monitor the intermediate results and augment data as necessary	• Use graphics but be mindful of data distortion • Be realistic and forthright about uncertainty • Use language that can be understood by the user of the report

STEP 5

TNA REPORT AND PRESENTATION

After the TNA, a report must be prepared to summarise the different needs uncovered by the process. The TNA Report should be organised as follows:

1. Begin with your rationale.
2. Build credibility by presenting the data gathering and analysis process.
3. Present key findings of both learning and non-learning needs.
4. Make obvious transition to recommendations. Recommendations must be separate from the findings because recommendations emanate from the findings.
5. Be flexible enough to consider the perceptions and insights of your key stakeholders. This will create buy-in for future actions to be taken.
6. End with what decisions should be made and actions to be taken by management.

(See Annex A for a sample of the TNA Report.)

COMPONENTS OF THE TNA REPORT

The TNA Report usually follows a standard format. It contains the following:

SECTION 1. BACKGROUND AND RATIONALE

- Here you will explain the context of your TNA and its purpose.
- Describe why you are conducting a TNA.
- Clarify and set the scope of your study.
- Talk about the information you need and procedures that you will follow to generate the information in broad strokes.

SECTION 2. TNA OBJECTIVES

Your TNA objectives will be determined by the reason you express in the Background and Rationale. The TNA is usually done to help address the following situations:

- TNA's are usually done in order to help alleviate the following situations:
  - Solving a current problem
  - Avoiding a past or current problem
  - Creating or taking advantage of a future opportunity
  - Providing learning, development or growth

SECTION 3. STAKEHOLDERS

- Here you will detail the background and context of the stakeholders of the TNA.
- Specifically, who are your target groups, respondents, and information gatherers?
- You will outline the criteria for selection and roles.
- Your respondents are the main resource for your TNA. You have to consider their characteristics in creating your data gathering tools.

SECTION 4. METHODOLOGY

- Here you will explain your procedures in detail.
- How does your choice of method generate the information that you need? Examples of methods are as follows:
  - Structured Interview
  - Semi-structured Interview
  - Observation
  - Questionnaire Survey
  - Focus Group Discussion
  - Workshop
- Check the feasibility of your chosen methodology.
- It helps to outline the steps that you will undertake and developing the tools.

SECTION 5. FINDINGS AND RECOMMENDATIONS

- Here is where you will discuss the results of your data analysis.
- It is important to note all the significant findings and put them parallel to your set objectives for the TNA.
- From analysing the results, you can now determine what kind of L&D solutions or recommendations can be used to address the needs/problems that arise.

SECTION 6. REFERENCES AND APPENDICES

- Here you will take note of all the references you've used in the making of your TNA and the subsequent analysis of the data you've gathered.

CHAPTER III

LEARNING & DEVELOPMENT DESIGN AND DEVELOPMENT

III LEARNING & DEVELOPMENT DESIGN AND DEVELOPMENT

PURPOSE

The L&D Design and Development process is undertaken to ensure that the content and coverage of the learning intervention are directly related to the identified learning needs, which when addressed, will address performance gaps. A systematic design and development process will lead to the achievement of stated learning objectives. In addition, a good design will result in L&D that is effective as well as time and cost- efficient. It ensures that only those topics and skills needed are included in the L&D course or program.

ADULT LEARNING PRINCIPLES APPLIED TO DESIGN AND DEVELOPMENT

1. **Adults decide what they want to learn:** Designs should be clear about what the participants can learn from the L&D intervention. Learning objectives should clearly specify what the participants are able to do after the intervention.

2. **Adult learners are also sources of learning:** Designs should maximise the use of methodologies that allow participants to learn from each other's experiences, expertise and insights. Content should be sufficient to provide the focus for discussions but the process should allow participants to contribute especially with respect to the practical application of what is being learned.

3. **Adult readiness to learn is based on their own perception:** Content should be something new to the participants to stimulate learning but not too unfamiliar that the participants will feel they are not yet ready to learn the material.

4. **The learning orientation is focused on addressing life situations, performing tasks effectively and solving problems:** Designs must be able to relate content to real life situations and demonstrate how participants will be able to perform better after the L&D intervention. Methodologies should allow participants to actually perform tasks being learned or to solve relevant problems.

5. **Adult's motivation to learn is intrinsic:** Adults are motivated to learn since they find it relevant to their lives. Designs should, as part of the learning process, emphasise the relevance of the content to participant needs. Methodologies should provide ample opportunities for participants to assess own learning and how they are progressing.

DESIGN AND DEVELOPMENT PROCESS

Process Flow	Responsible Person	Details
Translate Learning Needs	Supervising Administrative Officer/ Administrative Officer	Use Bloom's Taxonomy and SMART (Specific, Measurable, Attainable, Results-focused, Time-bound) format in formulating the Learning Objectives
Expand Learning Objectives	SAO/ AO	Expand Learning Objectives into three levels: Course, Module and Detailed Objectives
Source, Select and Sequence Content	SAO/ AO	Source and select content based on Learning Objectives. Sequence using Course Map.
Determine Delivery System	SAO/ AO	Select appropriate Delivery System based on the content of the course and the target participants.
Develop Course Brief and Design Matrix	SAO/ AO	Document course description, goals, objectives, participants, and content into Course Brief and Design Matrix
Select or Develop Methodologies	SAO/ AO	Identify and add to Design Matrix methodologies based on content participant profile
Develop Course Materials	SAO/ AO	Develop materials based on the content, participant profile and methodologies to be used
Conduct Pilot Run	SAO/ AO	Conduct Pilot Run to test the design before actual implementation. Use participants who can help evaluate
Evaluate, Enhance and Finalise	SAO/ AO	Evaluate, enhance and finalise the design including all materials to be used in actual implementation

ADULT LEARNING PRINCIPLES

The design and development processes and procedures contained in this manual follow adult learning principles which ensure that any learning intervention will be relevant and effective. These principles should guide the learning facilitator in designing and implementing any L&D activity.

1. Adults are internally motivated and self-directed.
2. Adults bring life experiences and knowledge to learning experiences.
3. Adults are goal-oriented.
4. Adults are relevancy-oriented.
5. Adults are practical.
6. Adult learners like to be respected.

Adults learn best when they understand why the L&D or any part of it is important to know or do. Their learning preferences should be considered in the design. L&D activities should emphasise the use of experience, and should design activities that apply what is learned. If the L&D intervention is in the form of classroom learning (otherwise known as "training"), care should be taken that the environment is positive, supportive and encouraging.

PART 1. THE DESIGN PROCESS

KEY DESIGN TASKS

L&D design, as a sub-process in the ADDIE model or methodology has several major tasks. The trainer should follow the steps below:

- Formulate learning objectives
- Select and organise content
- Determine learning methodologies
- Determine resources needed
- Prepare detailed L&D plan
- Develop evaluation plan

In formulating learning objectives for the L&D program or course, the learning facilitator should keep in mind the different types of objectives that are appropriate to the type of skill or competency that the intervention intends to develop. In addition, for PGDdN, the objectives of the learning/L&D intervention must also contribute to workplace development objectives that address PGDdN's long-term strategic objectives. The process is shown below:

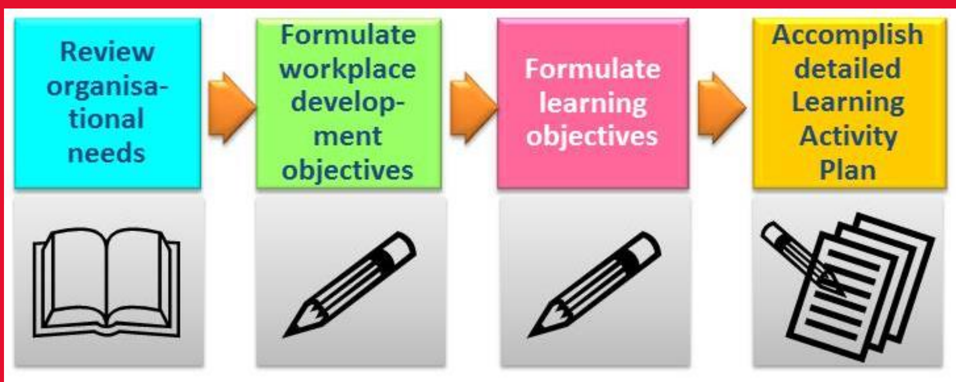


Figure 9: Steps in Creating Learning Activity Plan/ Design Matrix

BLOOM'S TAXONOMY

Benjamin Bloom spearheaded the categorization of educational or learning objectives, now known as Bloom's Taxonomy, into three domains: cognitive, affective and motor skills. These domains were further categorised into skills levels from the simplest to the most complex. In formulating learning objectives, bear in mind what skill domains are being developed. The taxonomy lists the kind of action words that best correspond to the skill domain.

(See Annex E for the taxonomy table.)

LEARNING OBJECTIVES/ EXPANDED LEARNING OBJECTIVES

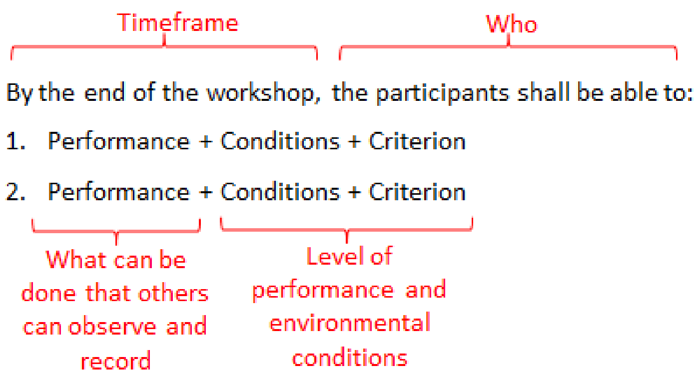
LEARNING OBJECTIVES

According to Robert F. Mager, proponent of the Criterion Referenced Instruction, instructional or learning objectives must satisfy three (3) characteristics, namely:

1. **Performance** specifying what the learner is expected to be able to do after the L&D intervention in terms of behavioural descriptors.
2. **Conditions** under which performance is expected to happen.
3. **Criterion** specifying the acceptable level of performance.

The above characteristics describe learning as something manifested in terms of observable and measurable behaviour and actions. Objectives are best formulated and written using the following criteria:

1. **Specific** enough to distinguish changes in behaviour before and after the L&D intervention.
2. **Measurable** to determine the degree of change in behaviour.
3. **Aligned** such that the change in behaviour is relevant to the needs of the organisation.
4. **Reasonable** enough such that the change is possible within the conditions provided.
5. **Time-bounded** to specify when the change should have been reasonably realised.



EXAMPLE:

From the Session Guide of the Upholding Integrity Group:

At the end of the module the participants will be able to:

- *Define "Commitment to Public Interest" as one of the norms of Conduct of Public Officials and Employees; and*
- *Identify demonstrable behaviours pertaining to "Commitment to Public Interest".*

EXPANDED LEARNING OBJECTIVES

In formulating learning objectives, a hierarchy of objectives should be followed. There are three levels:

First Level: **Course Objectives or Terminal Objectives** give learners an over-all guide to what they will be able to accomplish and do at the end of the L&D intervention.

Second Level: **Module Objectives** tell learners what they specifically need to know and do during sessions or modules of the intervention.

Third Level: **Enabling Objectives** provide the appropriate detail, such as supporting information or sub-tasks that will enable the learner to perform the task expected during the module.

Each course or L&D intervention will have these three types of objectives in the design.

SOURCING, SELECTING AND SEQUENCING CONTENT

SOURCES

L&D content or what topics, ideas, principles will go into the L&D intervention, can be sourced from various people and documents. These will supply the information, data, or procedures/ methods that will be included in the intervention. An L&D specialist or a course designer can use or consult the following:

1. Subject Matter Experts
2. Organisation Documents
3. Technical Manuals
4. Quality Control Manuals
5. Standardised Tests
6. Existing L&D
7. Literature such as books and journals
8. Observations

ORGANIZING CONTENT

Chunking is grouping, categorizing and organizing content to make it manageable given the limited cognitive resources of the learners. Chunking reduces complex diverse materials into simple but useful learning bits. Mind mapping is an effective way of organizing content.

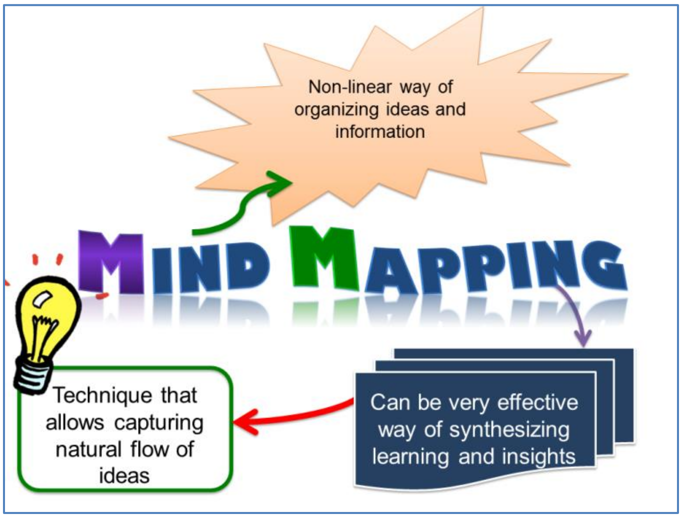


Figure 10: Mind Mapping

SEQUENCING METHODS

Various methods can be used to sequence learning or the topics of the module, depending on the type of skill or learning that will be provided. Once a sequencing method is used to organise the content, however, the design should use this method consistently for the major modules or topics of the course.

1. General to specific
2. Simple to complex
3. Known to unknown
4. Problem to solution
5. Logical sequence
6. Chronological

For example, in designing a course dealing with values and behaviours, a **simple to complex** and **known to unknown** will be good sequencing methods. The **problem-solution method** can also be used. The **chronological method** is usually followed when procedures or step-by-step processes are being taught.

COURSE BRIEF AND DESIGN MATRIX

COURSE BRIEF

There may be times when a course brief has to be prepared in order to obtain approval of the implementation of an L&D program. The Course Brief usually consists of the following:

1. Course Description
2. Target Participants
3. Course Goal
4. Course Objectives
5. Course Outline
6. Duration

DESIGN MATRIX

During the design proper, an L&D design is prepared using a design matrix with the following elements:

Day/Time	Learning Objectives	Session/ Activity	Expected Outputs	Topic/Content Highlights	Teaching / Learning Methodology	Nominated Facilitator

Please refer to Annex B for the sample.

EXAMPLE:

From the Design Matrix of the Building Partnerships Group:

Day/ Time	Session Objectives *<What will learner achieve/ accomplish at the end of session? >* *At the end of the session, participants will be able to:*	Session/Activity *<Indicate title of session/ activity? >*	*Expected Outputs <What concrete outputs will be produced during the session/ activity? >*	Topic/Content Highlights *<What topics/ subject matter will be covered during the session? >*	Learning Methodology *<What learning methodologies will be used to help achieve the session objectives? >*	Facilitator/ Resource Person/ Learning Team *<Who will facilitate the learning session? Who will provide conceptual inputs? >*
10:15-11:00	1. Define Partnership, Networking, Collaboration and Cooperation 2. Differentiate one from the other 3. Explain the need for forming partnerships	**"Which is Which?"** Partnership. Networking. Collaboration.		**Module 1. Perspectives Setting** *Definition of Terms - Partnership, Networking, Collaboration * Why form Partnerships? * Networks (Informal and formal networks) *Networking Basics	**Group Work:** Open Space Technology – volunteers will be asked to host the terms and invite participants to converse with the host on the term assigned to her. Brainstorming and discussion will follow. Lecture on the definition of terms and setting the right perspectives.	Lourdz Cesar

LEARNING METHODS

There are several learning methods to choose from when you design your modules and sessions. Some tips are found below:

CHOOSING LEARNING METHODS

TIPS

1. There is no such thing as THE BEST learning method.
2. Almost all methods have specific applications, advantages and limitations.
3. Appropriate blend heightens learning experience.

The goal is to use the most appropriate mix that addresses learning **needs** and suits learning **styles** of learners to facilitate **acquisition** and **transfer** of learning.

Learning methods can be classified into inductive and deductive methods.

INDUCTIVE METHODOLOGY
(discovery or inquiry learning)

Premise for Inductive- knowledge is built primarily from learner's experience or interaction with an event or process. It allows learners to start with an experience, examine and reflect on that experience, draw generalization and insights, and then move into the arena of action.

DEDUCTIVE METHODOLOGY
(direct instruction)

Premise for Deductive- highly structured presentation of content leads to optimal learning. Trainer typically present general concepts of principles, provides example of illustration, then allows learners to draw possible applications.

INDUCTIVE METHODS

1. Structured Learning Exercise
2. Case Study
3. Mind Mapping
4. Buzz Session
5. Role Play

(The definitions of the terms above are found in Annex C.)

EXPERIENTIAL LEARNING

A process that is characterised by **constructed events** that can lead to **reflection** on the meaning of the experience, and subsequent personal or group decision to **change.**

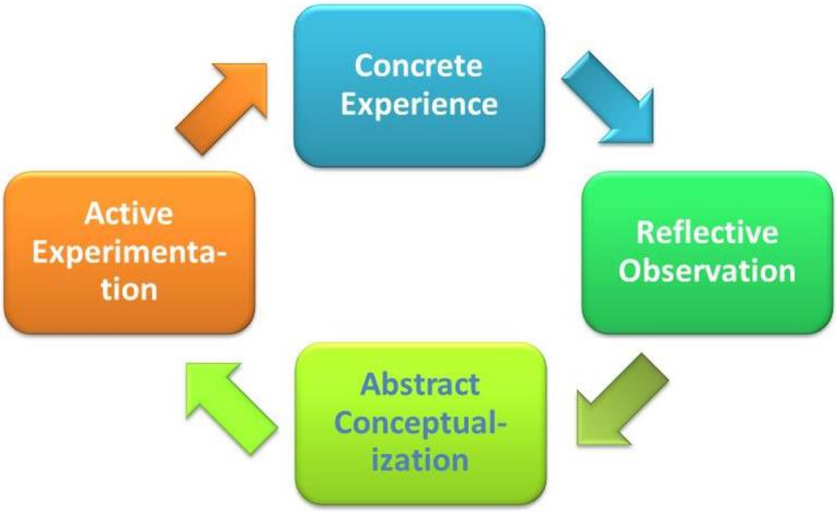


Figure 11. Kolb's Experiential Learning Cycle

The concepts are defined as[4]:

- **Concrete Experience** – "a new experience or situation is encountered, or a reinterpretation of existing experience," or doing something
- **Reflective Observation** – "of the new experience. Of particular importance are any inconsistencies between experience and understanding," or reflecting
- **Abstract Conceptualization** – "reflection gives rise to a new idea, or a modification of an existing abstract concept," or theorizing
- **Active Experimentation** – "the learner applies them to the world around them to see what results," or action planning

[4] http://www.simplypsychology.org/learning-kolb.html

The key elements of experiential learning are:

- *Meaningful* experience that can facilitate change in knowledge, attitude or skill
- Accompanied by *critical thought* and *reflection* on the experience
- Provides opportunity for learner to *decide* to undertake some kind of action

THE 4 A'S

Experiential Learning is also known as the 4 A's. This approach is effective when group activities are undertaken to facilitate learning.

Figure 12. 4 A's

The concepts are defined as:

- **Activity** – a structured experience to engage the learner. It is a "what to do" phase where the goal is to develop a common base for the discussion that follows.
- **Analysis** –a reflective feedback, a process of inquiry into the activity. It is a "why" phase where learners share their experiences to learn from others.
- **Abstraction** –an integration of the activity and analysis phases with theory inputs. It is the "so what" phase where the facilitator derives generalizations or integrates the various concepts in the learning session.
- **Application** –a practical synthesis where the facilitator transfers insights into real-life concerns. It is the "now what" phase where generalizations are applied to the workplace.

PART II. COURSE DEVELOPMENT

Once the course design is complete with objectives, learning or instructional methods, activities and learning checks, the course designer has to develop the course or instructional materials needed during the course delivery. These materials will include handouts, descriptions of games or activities, written cases for discussion, presentation materials, videos, evaluation materials, and job performance aids.

There are different guidelines for preparing presentation or visual materials, as well as for printed materials. Take note of the guidelines below for preparing the different types of materials:

LEARNING PREFERENCES

It is also important to understand learning preferences when designing or selecting experiential activities. There are different types of learners based on their preferences.

1. **Visual Learners** readily absorb data that they can see such as texts, graphics, charges, videos, demonstrations and non-verbal communication.

2. **Auditory learners** readily absorb data that they can hear such as lectures, discussions, verbal feedback, stories, sounds, songs, and music.

3. **Kinaesthetic learners** readily absorb data that they can process physically such as hands-on practice, note-taking, games and activities, and projects.

GUIDELINES IN DEVELOPING MATERIALS

PREPARING PRINTED MATERIALS

1. Number the pages
2. Explain why not to do something, rather than just saying “Don’t do it”
3. Use 10 to 14 point font
4. Use short sentences (10 to 15 words)
5. Use short paragraphs (3 to 4 sentences)
6. Avoid clichés, too much repetition, technical jargon without definitions, and acronyms without explanations

Do you need to put your project's name? Are there specific logos that you have to include? Please keep in mind any branding guidelines you might need to follow.

Strengthening Management of PG Davao del Norte's HRD – Learning and Development Services

Australian Aid PAHRODF PHILIPPINES AUSTRALIA HUMAN RESOURCE AND ORGANISATIONAL DEVELOPMENT FACILITY

Bloom's Taxonomy of Learning Domains

Source: http://www.nwlink.com/~donclark/hrd/bloom.html#revised

Include a title of your handout and source. Your source can be mentioned either in the front page or at the last page.

Bloom's Taxonomy was created in 1956 under the leadership of educational psycholog Benjamin Bloom to promote higher forms of thinking in education, such as analysing a evaluating concepts, processes, procedures, and principles, rather than just rememberi facts (rote learning). It is most often used when designing instruction or learning proce (Instructional Design).

The Three Types of Learning

A committee of colleges, led by Benjamin Bloom (1956), identified three domains of learning:

1. **Cognitive:** mental skills (*Knowledge*)
2. **Affective:** growth in feelings or emotional areas (*Attitude*)
3. **Psychomotor:** manual or physical skills (*Skills*)

You can choose to use different font styles (bold, italic, underline, etc.) if you are inclined to emphasize certain words or content.

Domains can be thought of as **categories**. Trainers sometimes refer to categories as KSA (Knowledge, Skills, and Attitude). This taxonomy o be thought of as "the goals of the learning process." That is, after a learner should have acquired new skills, knowledge, and/or attitude This compilation divides the three domains into subdivisions, startin behavior to the most complex. ***The divisions outlined are not absolutes and there are other systems or hierarchies that have been devised in the educational and training world. However, Bloom's taxonomy is easily understood and is probably the most widely applied one in use today.***

Define acronyms

Cognitive Domain

The cognitive domain involves knowledge and the development of intellectual skills. This includes the recall or recognition of specific facts, procedural patterns, and concepts that serve in the development of intellectual abilities and skills. There are six major categories, which are listed in order below, starting from the simplest behavior to the most complex. The categories can be thought of as degrees of difficulties. That is, ***the first ones must normally be mastered before the next ones can take place.***

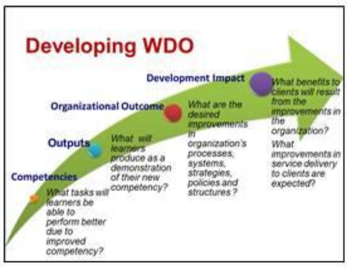
Category	Examples and Key Words (verbs)
Knowledge: Recall data or information.	**Examples:** Recite a policy. Quote prices from memory to a customer. Knows the safety rules.

1

Constantly check the visibility and clarity of your text and pictures on your handouts. If you will photocopy the document, print a "Normal" copy instead of a "Draft."

You can use your PowerPoint slides as handouts. Choose "handouts" from Print Layout and you can opt for the 3 slides with lines for notes, as shown on the left, or other options like 1, 2, or more. Keep in mind certain slides might need to be printed separately due to their content such as tables or charts to be seen more clearly.

Will your handouts be printed in colored or black ink? Check if your font sizes are still understandable by printing a test copy. Adjust your font sizes accordingly. Remember that certain colors might be difficult to see in hard copy format.



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POWERPOINT PRESENTATIONS

1. State Presentation Objectives
2. Provide Presentation Outlines
3. Understand your audience
4. Use seven plus or minus two lines per slide
5. Use at least 20 point fonts
6. Start with the Main Point (over-all) then go into the details (specifics)
7. Use bullets
8. Each slide should have a title
9. Use a mixture of relevant graphics, charts and pictures
10. Use colours sparingly and systematically
11. Make sure the background colour or picture does not affect readability of the text
12. Summarise the Main Points

Include the name of the training or learning intervention. Indicate which part if there are multiple parts or segment.

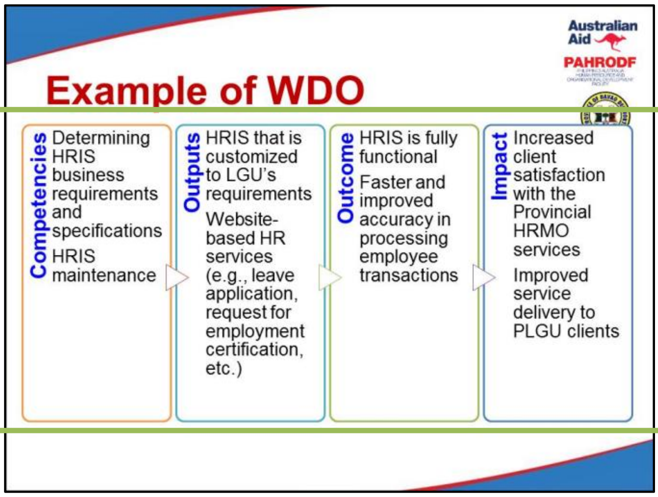
Include the name of the program or project

Include the name of the venue and the date. But you can also opt not to include that.

The title can be included in your slide. However, sometimes you can choose not to include this when you want to emphasize something—such as a quote or a fact.

Include logos if needed but keep it in areas where it will cause the least

Check if your font color or sizes can be clearly and visibly seen. Be careful of too bright colors or too small font sizes.



Try to limit the content per slide. In case you need to show more data, try to organize it so that it's easy to understand.

FLIP CHARTS

1. Prepare complicated Flip Charts in advance
2. Use seven plus or minus two lines
3. Don’t use the bottom third of chart
   (those in the back will not be able to see)
4. Write key points only, no sentences
5. Title each page
6. Leave blank pages between prepared sheets
7. Use multiple colours, but use them systematically
   (e.g. red for emphasis, blue for main points, black for sub-points)

JOB AIDS

The different types of job aids are:

1. Correctly Filled Forms
2. Checklists
3. Worksheets
4. Photo-diagrams
5. Task Lists
6. Conversion Tables
7. Graphs
8. Reference Books
9. Step-By-Step Self-Instruction Sheets or Books
10. Schematic Drawings
11. Flow Charts

Note:

- Let participants prepare their own job aids when they develop their materials
- Organise information according to how users see and use it, not according to the information itself

VIDEOS

1. Video Presentations should not be more than 8 minutes (attention will drift away from the video)
2. When using movies, present only the relevant portions and use guide questions to keep their attention focused
3. Don't choose videos for dialogue only but more for the over-all emotional impact

AUDIOS

1. Avoid using special effects for its novelty. They distract the participants
2. Use appropriate music to time class activities
3. Choose familiar songs with relevant lyrics

Instructional materials (course materials) are evaluated based on the guidelines provided. For example, PowerPoint presentations are evaluated using the following form.

POWERPOINT PRESENTATION EVALUATION FORM

Legend:

1: Completely Disagree
2: Somewhat Disagree
3: Neither Agree nor Disagree
4: Somewhat Agree
5: Completely Agree

ITEMS	1	2	3	4	5	COMMENTS
1. The presentation objectives are clearly stated						
2. The presentation outline is logical						
3. The content is organised into logical chunks						
4. The flow of the presentation is easy to follow						
5. All information presented are readable						
6. There are no lengthy narratives						
7. There are no more than 9 words per bullet						
8. There are no more than 9 bullets per slide						
9. The lay-out of the slides are not cluttered						
10. All slides are properly titled						
11. Colours are used sparingly						
12. Colours are used systematically						
13. Colours are used effectively						
14. Graphics/Charts/Pictures aid in understanding						
15. Graphics/Charts/Pictures are not distracting						
16. All important issues are addressed						
17. The presentation is summarised						
TOTAL						

CHAPTER IV

LEARNING & DEVELOPMENT DELIVERY AND FACILITATION

IV LEARNING & DEVELOPMENT DELIVERY AND FACILITATION

PURPOSE

The L&D Delivery process is planned and organised to ensure that:

1. Facilitators and resource persons are well-prepared
2. All learning objectives are achieved through effective implementation
3. All participants are engaged in the learning process
4. The learning process is delivered in an efficient manner

ADULT LEARNING PRINCIPLES

1. **Adults decide what they want to learn:** Facilitators are sensitive to what individual participants want to learn and adjust the learning process to allow them to learn what they want to but still within the purview of the intervention's learning objectives.

2. **Adult learners are also sources of learning:** Facilitators minimally provide inputs through lectures and presentations. Learning is mostly facilitated through personal reflections and group discussions and interactions.

3. **Adult readiness to learn is based on the learners' own perception:** Facilitators modularise and sequence learning to progressively prepare participants for increasingly difficult challenges and tasks.

4. **The learning orientation is focused on addressing life situations, performing tasks effectively and solving problems:** Facilitators use individual and group activities to simulate life situations, perform tasks and solve problems.

5. **Adult's motivation to learn is intrinsic:** Facilitators build motivation into the methodologies and activities performed as part of the learning process.

DELIVERY SYSTEMS

Learning or training content can be delivered in several ways:

1. **Instructor-led Classroom training**: Formal Education; Conferences; Seminars; Workshops; Forum; Summits.

2. **On-the-Job training**: Job Assignment; Buddy system; Shadowing.

3. **Self-Directed Learning:** Modularised Self Instruction; Distance Learning

4. **Technology Based L&D**: Computer-Aided L&D; Simulators; eLearning; Webinars.

5. **Job Performance Aids**: Written Instructions; Charts; Diagrams; Forms; Matrices; Templates; Models.

6. **Documentation**: Technical Manuals; Quality Manuals; Process Flow Charts

L&D interventions, however, take many forms other than classroom training. Some of these are:

- Coaching
- Mentoring
- Benchmarking

These are described in Chapter VIII.

Although this manual focuses on formal or classroom learning as the method of delivery, the other delivery methods will still follow the processes and principles described here.

LEARNING & DEVELOPMENT DELIVERY PROCESS

Process Flow	Responsible Person	Details
Review Course Design and Materials	Facilitator	Review Course Design and Materials for completeness and need to update
Administer Pre-Course Activity	Facilitator	As may be specified in the Program/ Course Design, administer or cause to administer pre-course activities
Prepare and Stimulate Participants	Facilitator	Together with the Course Administrator, prepare the participants for learning
Facilitate Learning	Facilitator	Facilitate learning in accordance with the specifications in the Program/ Course Design
Integrate Learning	Facilitator	Together with the Course Administrator enable participants to integrate and plan to apply learning
Conduct Post Course Activity	Facilitator	As may be required in Program/ Course Design, conduct or cause to conduct post course activity
Supplement Training Report	Facilitator	Prepare and submit Facilitator's insights and recommendations to be included in the L&D Report

Facilitation Versus Presentation

An L&D specialist needs both presentation and facilitation skills to be an effective trainer. These two competencies are differentiated below. It should be noted that presentation is primarily a deductive method of learning, while facilitation is a more inductive method.

	Facilitation	**Presentation**
Focus	Learner	Presenter
Control	Shared	Presenter
Credibility	Group Process	Expertise

PRESENTATION SKILLS

Presentations can vary in format, depending on their purpose. For this manual, presentations are used to deliver educational or training sessions.

TIPS WHEN PRESENTING:

1. You can overcome your fear of speaking to an audience through preparation and rehearsal. As you gain experience, you will develop confidence and be able to control your fear.

2. Remember that you are in charge when you present. Prepare for the presentation by planning the content (information) thoroughly and knowing it fully.

3. Try to find ways to make the content and delivery enjoyable. Use humour when appropriate.

4. Be more credible by being comfortable with the topic and showing your enthusiasm and belief in what you are delivering.

5. Physical presence is important. Stand straight, project your voice, and maintain eye contact with your audience. Speak clearly.

SOCRATIC METHOD

The Socratic Method is often used in facilitating the learning process. It consists of asking a series of well-planned questions through which the learner's thinking is guided to the only correct solution possible. This method also requires both good listening and questioning skills on the part of the facilitator.

1. LISTENING SKILLS

To be a good listener while facilitating learning, you have to remain neutral (do not side with anyone's point of view or opinion), and to give your complete attention to what is being said. Make it a point to clarify statements given or paraphrase points made. Ask the speaker if your understanding of the statement(s) is correct.

2. QUESTIONING SKILLS

The Socratic Method relies on your skill in asking questions. Ask open-ended questions, not questions answerable by "yes" or "no". Ask for facts – what, who, when, where. Avoid asking "why" questions. Keep an open mind, and introduce hypotheses (what if) to explore other ideas.

HANDLING DISRUPTIVE BEHAVIOURS

When the learning facilitator manages learning in the classroom, there will be instances that disruptive behaviour occurs during a presentation, or when a group or class activity is being facilitated.

Disruption occurs when a participant's personal agenda conflicts with the learning process. The disruption however, tends to escalate into a power struggle when the facilitator reacts personally to the participant. According to Donald V. McCain and Deborah D. Tobey in *Facilitation Basics,* the best way to respond is to depersonalise the incident. Don't take the disruption personally against the participant. Focus on managing the behaviour with the end in view of continuing the learning process.

There are various ways to handle disruptive behaviour from a learner/ or participant. The following tips are usually effective:

1. Maintain a light atmosphere through humour.

2. Connect with the participants at a personal level.

3. Be mindful of maintaining the group learning process rather than getting caught in a one-on-one power struggle with a participant by encouraging the involvement of the rest of the group.

4. Protect participants as needed. Do not allow any participant to be embarrassed or bullied by someone else.

5. Deflect irrelevant issues by using parking lots or freedom wall, or acknowledging the participant's point and suggesting a separate discussion during the break.

6. Change the grouping, pacing or the activity.

CHAPTER V

LEARNING & DEVELOPMENT MONITORING AND EVALUATION

V

LEARNING & DEVELOPMENT MONITORING AND EVALUATION

PURPOSE

The purpose of the L&D Monitoring and Evaluation (M&E) process is to ensure that:

1. The effectiveness of L&D interventions is assessed by verifying attainment of learning objectives
2. Appropriate feedback is provided to Management, Designers, Administrators, Facilitators and Participants of L&D or learning interventions
3. Learning is properly facilitated and reinforced
4. There are continuing improvements in L&D design, administration and delivery

Through proper monitoring and evaluation, the significance and importance of the learning intervention is proven and reinforced.

ADULT LEARNING PRINCIPLES

1. **Adults decide what they want to learn**: L&D Evaluation is conducted before, during and after the L&D intervention and provided as feedback to make participants conscious of their own learning needs. Being aware of their current competency level helps participants decide to learn the content of an intervention.

2. **Adult learners are also sources of learning**: L&D Evaluation is in itself a learning methodology. Assessments serve as personal reflections from which the participants draw insights and learning. Sharing assessment results broaden participants' awareness by seeing other perspectives and situations.

3. **Adult readiness to learn is based on their own perception**: Self-assessments, especially if progressively done, strengthen perceptions of readiness to learn.

4. **The learning orientation is focused on addressing life situations, performing tasks effectively and solving problems**: L&D Evaluations are designed to assess participant's capability and effectiveness in performing tasks and solving problems.

5. **Adult's motivation to learn is intrinsic**: L&D Evaluation used as a feedback mechanism increases motivation to continually acquire more difficult and complicated competencies.

As a change intervention, an L&D program or course may be considered as an individual project. As such, it is subject to the process of monitoring and evaluation, particularly because of the resources that it will spend on the activity.

Monitoring is the systematic process of supervising L&D activities to ensure they are proceeding as designed, and are on schedule to be able to meet stated objectives and performance targets. It involves observing, listening, and documenting the progress of a specific intervention. The data acquired through monitoring is used for evaluation. Periodic monitoring will provide information on the progress of the intervention, changes in learning of the participants and which methods/ activities are achieving the most impact. In addition, it will provide feedback on the efficiency of the learning process and the effectiveness of the way the intervention is managed or implemented.

DEVELOPING AN M&E PLAN

An M&E Plan is prepared when the intervention is conceptualised and designed. The M&E Plan contains information on the systematic collection of data as well as the evaluation methods and activities to be undertaken (See Annex F).

A basis for developing an M&E plan for the L&D intervention is shown below.

The M&E Plan follows the levels of evaluation and their objectives, as shown below:

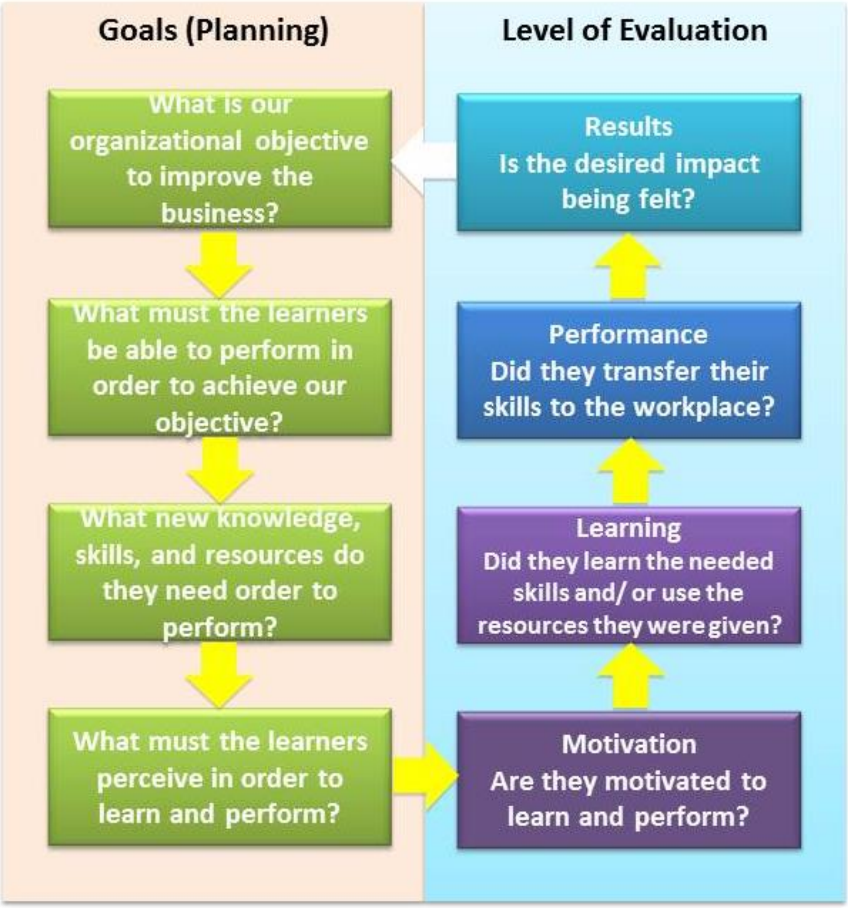


Figure 13: Circular Causality for Human Performance

FOUR LEVELS OF EVALUATION

L&D effectiveness should be assessed at different levels to determine if the intervention really contributes to organisational effectiveness. Donald L. Kirkpatrick recommends that to evaluate L&D effectiveness, several aspects must be considered. First, evaluate if the intervention encouraged participants to learn. Second, if participants were encouraged to learn, how much was learned. Third, evaluate how much of what was learned was actually applied in the workplace. And, lastly given the applications, evaluate how the intervention affected organisational performance and business results. Any weaknesses in L&D effectiveness in the lower levels will directly affect effectiveness in succeeding levels. L&D must be effective on all of the four levels.

1	2	3	4
Reaction Evaluation provides feedback on the participant's satisfaction with the learning environment. Items considered are: the facilitator's expertise in the content and in processing learning; the L&D Administrator's handling of the implementation before, during and after the L&D intervention; the design and methodologies used in the intervention; and the completeness, appropriateness and timeliness of the materials used.	**Learning Evaluation** provides feedback on the percentage of the learning content acquired by the participants and if such sufficiently demonstrates that the learning objectives were achieved. This also provides feedback if the individual participant has acquired the competency to perform specific tasks or jobs.	**Application Evaluation** provides feedback if the learning and the acquired competencies are properly applied in the workplace and has improved the participants performance on the job. This also looks into factors in the workplace environment that may affect application of learning on the job.	**Impact Evaluation** provides feedback on how applied learning created impact on the participants' organisational performance and if the desired organisation and business results are being achieved.

LEARNING AND DEVELOPMENT EVALUATION PROCESS

Process Flow	Responsible Person	Details
Prepare Evaluation Plan	Supervising Administrative Officer/ Administrative Officer	As part of the design stage, prepare the Evaluation Plan considering the 5 levels of Evaluation.
Develop Process and Instruments	SAO/ AO	Develop the Evaluation Process and Instruments based on identified needs, objectives and content.
Pilot Test Process and	SAO/ AO	Pilot test the process and instruments to determine validity and reliability. Enhance as needed.
Review Evaluation Plan	SAO/ AO	As part of the Program/ Course Implementation, review and implement the Evaluation Plan.
Administer Instruments	SAO/ AO	Administer the instruments as specified in the Evaluation Plan to gather data.
Summarize and Analyze Data	SAO/ AO	Summarise and analyse gathered data to assess L&D effectiveness and participant learning.
Prepare/ Present Evaluation	SAO/ AO	Prepare report and recommend participant status and improvements for future runs.

PREPARING THE M&E REPORT

1. Level 1, Level 2 and Level 3 M&E Results are best reported as part of the L&D Report (see Preparing L&D Report or Annex J).

2. Level 4 M&E Results is prepared separately from the L&D Report. Its content is as follows:

   - **Purpose** of conducting the Level 4 M&E
   - **Coverage** in terms of the number of batches implemented, number of participants and percentage of members to total for each of the organisational units involved
   - **Organisational, Performance and Learning Needs** being assessed (the assessment results for the performance and learning needs may be taken from the Level 2 and Level 3 Evaluation Results as reflected in the L&D Reports
   - **Findings and Conclusions**
   - **Recommendations**.

TIPS

- Reporting of Level 4 M&E Results depends on the type of intervention made. When an intervention, such as a team building, involves majority of the members of an organisation in one run, the Level 4 M&E Result is reported as part of the L&D Report. However, in most cases the Level 4 M&E is conducted only after several batches have been trained to have a significant impact on said organisation. In this case, the Evaluation Report is prepared separately.
- Recommendations must be reported in a different section in the report from findings and conclusions because the conclusions are the basis for recommendations.

CHAPTER VI

LEARNING & DEVELOPMENT ADMINISTRATION

VI LEARNING & DEVELOPMENT ADMINISTRATION

PURPOSE

The purpose of L&D Administration process is to ensure that:

1. Course implementation is deliberate, consistent, cost effective and time efficient
2. Facilitators, resource persons, participants and participant managers are provided with appropriate information before, during and after course implementation;
3. A conducive learning environment is created and maintained
4. Course proceedings and outputs are properly documented and preserved
5. Course evaluation is conducted, reported and used to improve L&D Design

LEARNING & DEVELOPMENT MANAGEMENT CYCLE

The L&D management cycle, which L&D administration is a part of, is shown below. L&D administration is a critical component of the delivery or execution of the learning intervention.

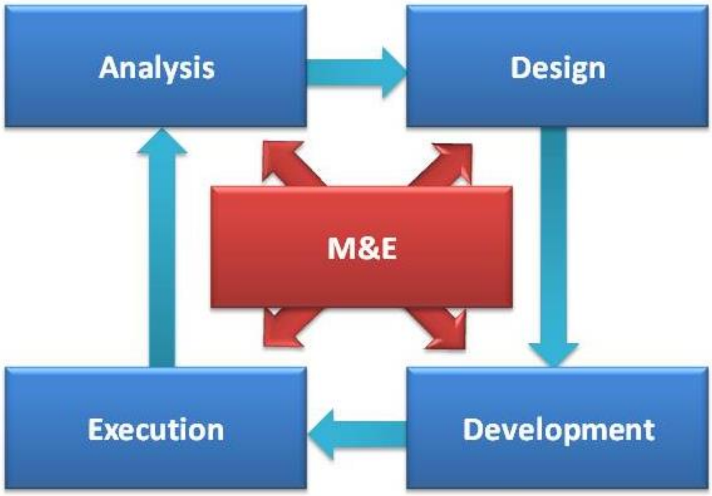


Figure 14: L&D Management Cycle

Like a journey, L&D administration serves to provide a road map, which will make the journey smooth and efficient for the learner.

Adult Learning Principles

1. **Adults decide what they want to learn:** L&D interventions should not be mandated but marketed. Although participants attend L&D interventions when they are mandated, they may not necessarily be engaged in the learning process. Invitations and other marketing collaterals emphasise what participants can learn and perform because of the L&D interventions. This allows target participants to decide that they will want to join and learn from the intervention. L&D Administrators at the start of an intervention engage participants into the learning process by levelling off expectations and allowing participants to make their own learning objectives.

2. **Adult learners are also sources of learning:** Engaging participants in the learning process allows them to contribute their own experiences, expertise and insights to enrich the intervention. The venue set-up and the learning environment in general encourage participation and interaction.

3. **Adult readiness to learn is based on their own perception:** Pre-course activities, levelling of expectations and course introductions influence participant's perception of his/ her readiness to learn.

4. **The learning orientation is focused on addressing life situations, performing tasks effectively and solving problems:** L&D Administrators when introducing the course, linking modules and integrating learning emphasise the intervention's relevance to the participants' needs to improve life, perform tasks better, and solve key problems.

5. **Adult's motivation to learn is intrinsic:** L&D Administrators maintain participants' motivation by continually emphasizing the relevance of the content and learning process to their needs. Motivation can also be heightened by providing feedback on how the participants are progressing in the learning process.

LEARNING & DEVELOPMENT ADMINISTRATION PROCESS

Process Flow	Responsible Person	Details
Review Course Design and Materials	Supervising Administrative Officer/ Administrative Officer	Review Course Design and Materials to determine need for enhancements or changes.
Schedule Implementation	SAO/ AO	Schedule date of course implementation and reserve venue as basis for preparing check-list
Select and Coordinate Participants	SAO/ AO	Select and coordinate Facilitators and Resource Persons called for by the Course Design.
Invite and Coordinate Participants	SAO/ AO	Market the program/ course as a means to inviting participants. Emphasise what can be learned.
Inform Participants' Managers	SAO/ AO	Inform participant Managers about scheduled attendance to ensure it will be supported by the Managers.
Acquire and Organize Resources	SAO/ AO	Ensure that all resources needed in the course implementation are available.
A		

Process Flow	Responsible Person	Details
A		
Check Course Materials and Venue	Supervising Administrative Officer/ Administrative Officer	On the implementation day, ensure that all course materials and venue are ready.
Open and Introduce Course	SAO/ AO	Establish a conducive learning environment by welcoming participants, levelling expectations, and building credibility of facilitator.
Link Course Modules	SAO/ AO	Link modules by giving recap and Introductions of module
Document Course Proceedings	SAO/ AO	Document course proceedings taking note of issues and concerns that may need special attention.
Integrate Learning	SAO/ AO	Integrate learning of participants and ensure that there are plans to apply them in the workplace.
Administer Course Evaluation	SAO/ AO	Administer Program/Course Evaluation as specified in the Evaluation Plan.
Award Certificates	SAO/ AO	Award Certificates as specified in the Program/Course Design.
B		

Process Flow	Responsible Person	Details
B		
Process and Record Payments	Supervising Administrative Officer/ Administrative Officer	Process and record payments of Expenses incurred in the Program/ Course Implementation.
Process Training and Participant Records	SAO/ AO	Prepare and ensure that the L&D and participant records are properly preserved.
Prepare Training Report	SAO/ AO	Prepare L&D Report Highlighting evaluation results and recommendations for future runs.
Conduct Post Course Activities	SAO/ AO	Conduct post course activities as may be specified in the Program/ Course Design and update the L&D Report accordingly.

ADMINISTRATION CHECKLISTS

In implementing an L&D intervention, an L&D Administrator needs to look into so many details that it is very easy to miss out on a particular detail. Checklists with sufficient detail help ensure flawless implementation by serving as a reminder for the L&D Administrator. It also serves as a basis for coordinating and levelling expectations between the L&D Administrator and L&D Manager, Course Designer, Facilitator and other L&D Specialists. Checklists should cover the following general areas of implementation:

1. **Pre-Course Administration** covering preparations for the venue, equipment and materials and coordinating with facilitators, resource persons, participants and participant managers.

2. **Course Proper Administration** covering the actual implementation from venue, equipment and materials check-up, to opening the intervention, linking modules and closing the intervention.

3. **Post-Course Administration** covering the administration of post course activities to paying expenses, conducting evaluation and preparing the final L&D report.

(See Annex H for the Implementation Checklist.)

COMMUNICATION AND MARKETING PLAN

Arranging for the delivery of L&D includes getting the participants by announcing the L&D and its schedule(s). It will help if the L&D specialist prepares a communication and marketing plan that will stimulate interest in the L&D program. The Communication and Marketing Plan will also help the proponent of the L&D to obtain management support. The Plan usually contains the following:

1. **Communication and Marketing Objectives**

2. **Key Audience/Stakeholders:** Managers, HR and/or Participants

3. **Key Messages:** Benefits, Facilitators, Difference from other interventions, testimonials of satisfied stakeholders, fees, contact numbers

4. **Method/Channels:** Word of Mouth, Telemarketing, Print, Electronics, Events

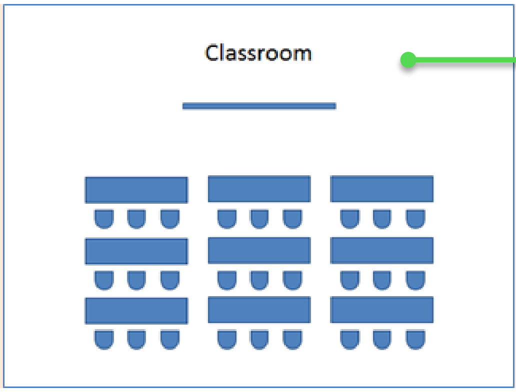
5. **When:** Schedules

6. **Who:** Responsible person

(See Annex I for the Communication and Marketing Plan template.)

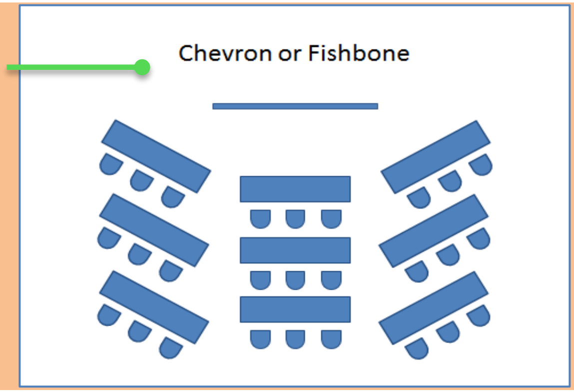
ARRANGING THE VENUE

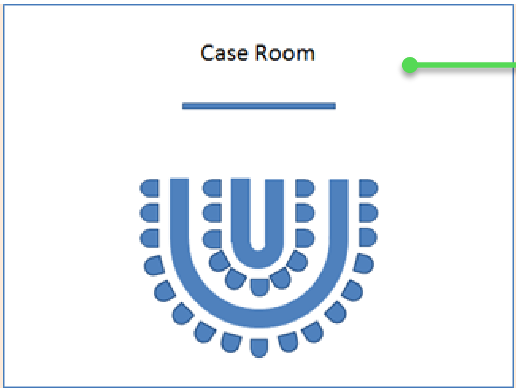
The seating arrangement in a venue can greatly influence the learning environment. Some factors that must be considered are the methodology, group size, venue size and facilitator's preference.



The Classroom Set-up is the most common for L&D programs, seminars, workshops, forums and summits. It is the most space efficient set-up although it has limitations with respect to face-to-face encounters and mobility among participants. This is therefore more appropriate for lectures and presentations rather than for facilitated activities.

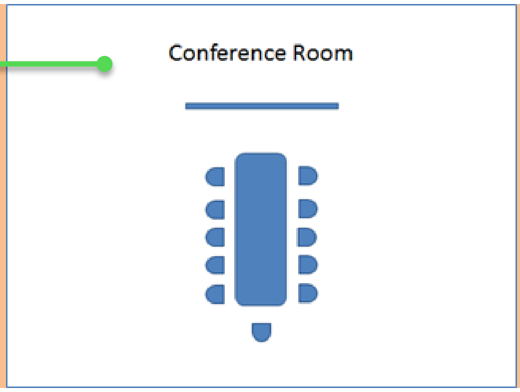
The Chevron or Fishbone Set-up is a slight variation of the Classroom Set-up. To a limited extent it allows face-to-face encounters among participants. This is appropriate for plenary discussions and inter-actions.

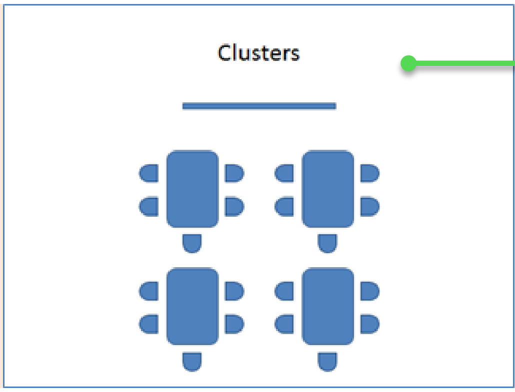




The Case Room Set-up provides greater inter-action among participants with its somewhat u-shaped arrangement. This is appropriate for courses with methodologies that are mostly case discussions.

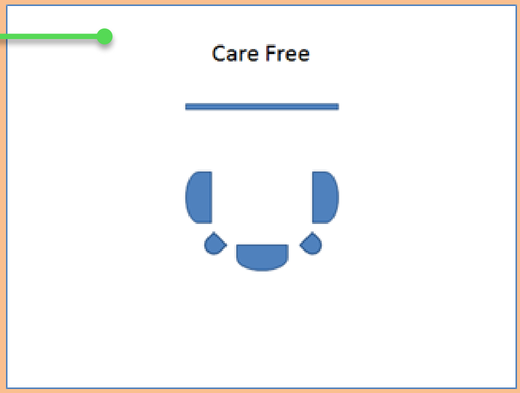
The Conference Room Set-up is ideal for small groups expected to be engaged in serious discussions. This can be done using a large conference table or the usual L&D tables arranged in a u-shape formation.

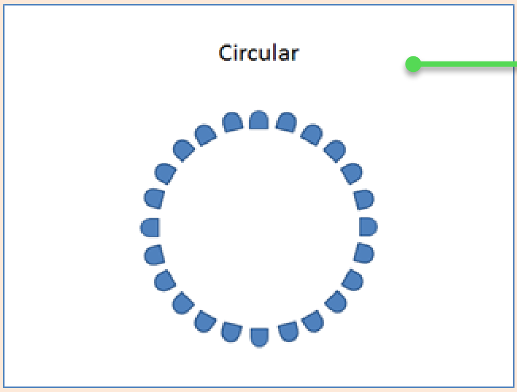




The Cluster Set-up is appropriate for workshops where the participants are expected to engage in small group discussions and activities. This set-up affords greater mobility including performing activities on the tables and between tables.

The Care-Free Set-up creates a relaxed environment that encourages participants to open up and engage in intimate discussions. This allows a greater degree of mobility than the Cluster Set-up and is therefore appropriate for physical activities where participants need to move around. However, the lack of tables makes it difficult for activities where the participants are required to write a lot.





The Circular Set-up provides the greatest mobility and interaction among participants. This is ideal for interventions with a large number of participants required to frequently group and regroup. Plenary discussions can be facilitated with the participants already facing each other in a circular formation. The chairs can easily be moved around to support discussions among small groups with varying sizes. The large open space in the middle of the circle can be used for very lively physical activities. As in the Care Free Set-up this is not ideal for activities where the participants will need to write a lot.

CREATING A LEARNING ENVIRONMENT

1. **Interpersonal Connection** – increase empathy and bonding
2. **Nurturing Feedback** – trigger self-regulation
3. **Sense of Belonging** – reduce threat in the environment
4. **Positive Future** – foster self-improvement
5. **Individual Differences** – strengthen identity and self-esteem
6. **Recognised Competency** – drives motivation and performance
7. **Emotional Expression** – results in openness

Preparing the Learning & Development Report

L&D Reports should be simple, easy to prepare but sufficient enough to serve its purpose. Majority of the L&D interventions will have durations of one, two or three days. Preparation of L&D Reports, especially for short courses, should not take more than one or two hours. Otherwise, the preparation of L&D Reports may become more tedious than the actual run of the intervention.

The L&D Report should at least contain the following key elements:

1. Implementation: L&D Administrator; Facilitators and Resource Persons; Target and Actual Class Size
2. Summary of L&D Evaluation
3. Summary of L&D Expenses
4. Highlights of Proceedings particularly points of interests such as issues and concerns that surfaced during L&D implementation.
5. Analysis, Conclusions, Recommendations. Specify to whom recommendations are addressed: Management, Managers of participants, Participants, L&D Manager, Designers, or Administrators.
6. List of Participants (with grades if required)
7. M&E Results (Levels 1-3)

(See Annex J for template)

CHAPTER VII

MANAGING LEARNING SERVICE PROVIDERS

VII MANAGING LEARNING SERVICE PROVIDERS

PURPOSE

The purpose of Managing Learning Service Providers is to ensure that:

1. The L&D or learning intervention is effective by sourcing and choosing the appropriate learning service providers, resource persons, or facilitators;

2. Appropriate information, communication, and contracting are prepared and completed in dealing with the learning service providers, resource persons, or facilitators.

Looking for Resource Persons

In looking for possible pool(s) of resource persons, the L&D Administrator can ask for referrals from PGDdN officials or experts/specialist in the field. He or she should call and make inquiries from industry associations or other government units. Once possible resource persons are identified, there should be a request for resumes. Further communication should be documented, either through a letter or email. Finally, an exploratory meeting should be scheduled so that arrangements and further validation of the resource person's suitability can be made.

Managing Resource Persons

Once an agreement is reached with the resource person, the following steps should be taken:

1. Prepare a TOR/MOA
2. Confirm time, date and venue of L&D
3. Clarify L&D goals and session details (objectives, time limit, resources available, etc.)
4. Ask for copies of materials/handouts
5. Check for support requirements
6. Provide a profile of participants

TERMS OF REFERENCE (TOR)

Terms of Reference are needed when an intervention is wider in scope and more complex than an L&D program. In this instance, the HRDD or PHRMO will have to prepare a formal document that is known as Terms of Reference (TOR). The TOR is useful because it provides "the background, objectives, and purpose of a proposed project. It includes a range of criteria necessary for strategic project decision making which defines what activities are to be done, indicates any issues, budget and needed expertise related to the project. In addition, it is used to judge the performance of contractors, consultants, experts, and other project stakeholders.[5]"

A format[6] for a TOR is shown on the next page with explanations on how to complete it:

[5] http://www.mymanagementguide.com/terms-of-reference-tor-template/
[6] Ibid.

Terms of Reference

Project Background

- The background of a project provides an overview of the history behind the project. It should clearly state why perform the project and refer to a programming context. The purpose is to provide the reader with a brief explanation of the need behind the project.
- The Background section of a TOR template usually includes several paragraphs which address the following issues:
    - Describe the project in the context of a related business need
    - State the general role of stakeholders in doing project activities
    - Highlight a brief overview of the project to date

Project Objectives

- The objectives of a project are those desired accomplishments that can be reasonably delivered upon project completion, with consumption of available resources and within an expected timeframe. They should clearly identify and define what is expected from the project and who the target audience is.
- The Objectives section of a Terms of Reference template should describe desired achievements at different stages of project lifecycle. It should also state the primary objectives of the project, which must be achieved upon success project completion.

Issues to be explored and analysed against certain criteria

- Any project involves a number of issues and problematic areas that must be addressed in order for the project to be implemented smoothly. The issues are the points of discussion or dispute throughout the project lifecycle. They cover any concern, query, request for change, or anything else that requires a resolution during the project. Unresolved issues may cause project failure.
- The Issues section of a TOR template should highlight key issues to be studied and disputed at every stage of the project lifecycle. Usually TOR includes a range of evaluation criteria to be used for issue analysis and solving. Here are generic issue evaluation criteria for most projects:
    - Efficiency – this criterion determines how well a given activity transforms available resources into desired outputs in terms of quantity, quality and time
    - Relevance – it help analyse whether a given activity is being performed with the desired benefits

    - Effectiveness – it concerns how far the project's outputs have been utilised and whether the project's purpose has been realised
    - Impact – this measure helps figure out the extent to which the project's benefits received by the target audience have an overall effect on larger numbers of people concerned
    - Sustainability – this criterion identifies whether the project's positive outcomes will continue after funding ends.

Implementation Methodology to be applied

- The implementation methodology of a project provides a set of broad principles and rules from which specific procedures will be derived in order to define how to carry out the project in a cost-effective way. It describes the main methods of project implementation.
- The Methodology section of a Project Terms of Reference template should therefore include a description of the following items:
    - Key phases of the project implementation process
    - The required level of stakeholder involvement that ensures smooth implementation
    - The content and duration of project activities and tasks
    - The information collection tools to be used throughout the project for monitoring purposes
    - Data analysis rules

Expertise required

- The expertise needed for doing a project defines a set of professional requirements for the individuals and teams involved in project implementation. It will be the basis for team building, including L&D and skill assessment.
- The Expertise section of a Project Terms of Reference template should identify the following:
    - The type of work involved in the project
    - The type of skills and abilities required to do project work
    - The exact number of individuals involved, including a description of their qualifications, experience, and other professional attributes
    - The period of engagement of each team member
    - A description of the duties and responsibility per teammate
    - The relationship between the team members, including leadership roles

Reporting requirements

- Reports provide valued information about project performance over a certain period. Reporting is a process that starts once a project is launched and continues until the project is completed and its product is handed over. Reporting requirements will define how to write and submit project reports and what information to include.

- The Reporting Requirements section of a Terms of Reference template should clearly specify the requirements for the reporting process, and might include the details of:
  - Table of contents for project reports
  - Rules for composing annexes
  - Report templates
  - The language to be used in reports
  - Computer software programs to be used
  - Submission dates
  - People responsible for reporting and approving
  - Other sufficient information, such as number of copies to be created, responsibilities for report production and presentation, etc.

Work plan, including activity schedules

- A work plan is a kind of strategy that aims to help solve problems throughout a project and boost employee drive and focus. It determines what actions need to be taken to start, implement, and complete the project within a specified time period and under defined budget. It is often used as a general guide for developing a project implementation plan.
- The Work Plan section of a Project Terms of Reference template should set out the activities and necessary resources required for achieving the project's results and purpose. It should therefore include a summary of the anticipated work and time schedule, which are based upon the following:
  - An analysis of the issues, in terms of the evaluation criteria
  - The proposed implementation methodology
  - The reporting requirements
  - The finance resources allocated to the project.

MEMORANDUM OF AGREEMENT (MOA)

A memorandum of agreement (MOA), or cooperative agreement, is "a document written between parties to cooperatively work together on an agreed upon project or meet an agreed upon objective. The purpose is for both parties to have a written understanding of the agreement which can also serve as a legal document that is binding.[7]"

A format[8] for a MOA is shown below with explanations on how to complete it:

[7] http://en.wikipedia.org/wiki/Memorandum_of_agreement
[8] http://www.advocatesforyouth.org/publications/616?task=view

MEMORANDUM OF AGREEMENT

I. Purpose of the Agreement

- This section states the big picture of why and how the parties came together and includes:
- Name of parties involved
- Brief description of the scope of work
- Financial obligations of each party, if applicable
- Dates agreement is in effect
- Key contacts for each party involved

II. Detailed Description of Roles and Responsibilities

- This section identifies the mutual and joint responsibilities (collaborative tasks) and the expected result of those joint efforts.
- It lists the specific roles and responsibilities of each entity and clarifies the purpose of the MOA.

III. Payment Schedule (if Applicable)

- This section should detail the amount of funding, if any, that one party will pay the other and the timing of the payment.
- The payment schedule should include a timeline of specific deliverables that will trigger payment.

IV. Duration of the Agreement

- This segment identifies the effective date of the agreement, its term (if there is one), and how the agreement can be modified or terminated.

V. Signatures of Parties' Principals

- Finally, to demonstrate agreement with the terms of the MOA, spaces are provided for the names and signatures of an official from each party who is authorised to approve agreements on the party's behalf. A space for the date the agreement was signed is also required. The MOA is not in effect until all parties have signed the MOA. Each party should then be provided with a signed original for its files.

MEMORANDUM OF UNDERSTANDING (MOU)

A memorandum of understanding is a written agreement "describing a bilateral agreement between parties. It expresses a convergence of will between the parties, indicating an intended common line of action, rather than a legal commitment. It is considered as a formal alternative to a gentlemen's agreement, but lacks the binding power of a contract. [9] No matter the length or complexity of an MOU, it specifies mutually-accepted expectations between two or more people or organisations as they labour together toward a common objective; they're generally not legally binding and don't involve the exchange of money[10]. It is different from a contract which is "a written, private agreement between two parties that is legally binding and can be enforced by a judge" and often includes a very detailed explanation for both parties involved.

[9] http://en.wikipedia.org/wiki/Memorandum_of_understanding
[10] http://people.howstuffworks.com/memorandum-of-understanding.htm

CHAPTER VIII

OTHER TYPES OF L&D INTERVENTIONS

VIII OTHER TYPES OF L&D INTERVENTIONS

During this intervention, the PGDdN pool of trainers experienced other forms of learning and development activities. In addition to classroom learning, the PGDdN pool of trainers went through coaching, practicum, and benchmarking. These other types of L&D interventions enhanced and enriched the participants' learning.

Like classroom learning, these types of interventions should be designed and implemented following the learning cycle (ADDIE model) described in the previous chapter. These interventions also go through a needs analysis, a design and development phase, and must be delivered/ implemented according to set guidelines. However, the level of effort and detail that go into the process are not as extensive as those in classroom learning or training interventions.

COACHING

Coaching is a learning and development intervention wherein a person (coach) assists and supports another person (the learner) through encouragement and advice. A coach does not need to be a specialist within the area in which the learner requires support. His/her role is to ask powerful questions and listen to guide the learners to find answers within themselves, to find the right answers or produce the right outputs. The purpose of coaching is to enhance the coachee's performance. Coaching is about helping people decide on what they will do to improve.

GROW PROCESS OF COACHING

Coaching is usually done following the GROW Approach:

- **Goals** – Establish what the coachee wants to achieve
- **Reality** – Clarify the situation objectively
- **Options** – Ask more questions so coachee can identify available options
- **Wrap up** – Lead the coachee to make a decision on which option to take, and what the next steps are (Refer to CSC Coaching Guidebook)

During this intervention, coaches guided the pool of trainers in conceptualizing, designing, and producing the outputs needed after each phase of instruction. There were two documents used in planning for the different coaching activities during the HROD intervention: Coaching Timetable and Coaching Plan.

The Coaching Timetable looks at the HROD intervention as a whole with the targeted organisational outcomes and workplace objectives. The various coaching activities are then identified for the different segments of the project. The Coaching Timetable template is shown below:

COACHING TIMETABLE

Desired (Targeted) Organisational Outcomes:	
Partner Organisation's commitment:	

Duration, Dates, Venue	Description of the Process <How will the coaching process be conducted? Activities to be done?	Expected Output/s <Indicate what will be produced during/after the coaching?	Target Participants	Name of Coach/Mentor

The Coaching Plan explains in more detail each of the identified coaching activities in the coaching timetable.

COACHING PLAN

Activity:	
Date:	
Expected Output/s:	
Participants:	
Coach:	
Venue:	
Need for meals (specify):	
Need for documents (specify):	

PRACTICUM

Practicum is a planned activity that involves applying the knowledge and skills acquired in the workplace, or using a live audience to test the new skill learned. For this intervention, the pool of trainers' practicum consisted of implementing the session guides that they developed by conducting actual sessions before a group of PGDdN Division and Section Heads. They managed the entire training intervention, including planning the conduct, inviting participants, and presenting instructional materials before their target audience.

A Practicum Plan was prepared for this HROD intervention which identifies the objectives of the activity, mechanics/ guidelines of how it will proceed, and requirements in completing the activity.

A sample is shown below:

PRACTICUM ACTIVITY PLAN

Learning Objectives:

By the end of this practicum, the participants shall be able to:

- Demonstrate and implement effective delivery and facilitation skills during a learning session;
- Manage the conduct of a learning & development session;
- Mobilise resources (including resource persons and external providers); and,
- Evaluate a learning & development session.

Detailed Instructions:

1. Each team will choose 2 sessions from among the sessions that they prepared and will be given 1.5 hours to run them during the practicum day assigned to them.

2. Even if most of the previously prepared session guides is set for 2 hours, for the purpose of the practicum, teams will have to just focus on the “heart” of the session and run each session for 45 mins only. 4As learning approach will still be used/ followed.
3. Each team member should be given a significant amount of “stand-up”/”facilitating time”. So teams may decide to team teach/co-facilitate the sessions.
   Example: One team member may run the Activity and Analysis portion of the session, then another team member may continue and run the Abstraction and Application portion.
4. While one team is facilitating, other teams may act as support.
5. 15 participants (Division Chiefs and Asst. Division Chiefs) will be invited by the PHRMO to act as participants during the sessions.
6. The teams are also expected to take charge of not only the technical side of running the session but also the administrative aspect of running learning sessions:
   These are the following:
   a. January 8-9, 2015
      - Preparing cost estimates for the meals of the participants and supplies and materials needed for their own sessions, to be submitted to PJ. Budget will be provided by the LSP.
      - Reserving/ordering meals for the day assigned to them (with the coop).
      - Preparation of presentation materials.
   b. January 12-13, 2015
      - Preparing ID tags, registration forms, evaluation forms (materials, printer will be provided by the LSP)
      - Walkthrough of sessions with the coaches.
      - Finalization of presentation materials.
   c. January 14-15, 2015
      - Assist the teams on board (the ones who are actually conducting the session).
      - Document the highlights of the session assigned.
      - Participating in a giving and receiving of feedback session with the other teams present, LSP process observers and other coaches
      - Participating in a plenary debriefing session with all the members of the team and the LSP on January 15, after the session of the last group.

7. Details of all the tasks will be discussed during the plenary session on January 8, 2015 at 9:00 AM, venue to follow (c/o PHRMO).
8. **Note 1: Coaches will provide guidance in all the activities to be done. Consultation from January 5-7 will be done online. Then coaches will be in PGDdN January 8-9, 12-15, 2015 for the practicum coaching and actual conduct of practicum.**
9. **Note 2: Please refer to the schedule of activities for the activities from January 16 onwards.**

Schedule

DAY 1, January 14, 2015, Wednesday

1. Team PROBLEM SOLVING
   09:00 AM – 10:30 AM to be assisted by Team Building Partnerships
2. Team UPHOLDING INTEGRITY
   10:45 AM – 12:15 PM to be assisted by Team Collection Management
3. Team BUILDING PARTNERSHIPS
   01:15 PM – 02:45 PM to be assisted by Team Risk Management

DAY 2, January 15, 2015

1. Team COLLECTION MANAGEMENT
   09:00 AM – 10:30 AM to be assisted by Team Problem Solving
2. Team RISK MANAGEMENT
   10:45 AM – 12:15 PM to be assisted by Team Upholding Integrity

BENCHMARKING

Benchmarking is an L&D activity wherein certain organisations that have reached a specific standard or achievement in a field of study are used as comparison by another organisation that aspires to attain the same standard or achievement. Learning occurs through observation, discussion of best practices, and presentation of methods/strategies used to address issues.

STEPS IN BENCHMARKING

1. Define what areas to benchmark

a. Identify topic(s) for the activity
b. Identify possible organisations to benchmark by conducting research/ inquiries
c. Identify resources needed for the activity (e.g. participants, budget, etc.)

2. Select the company/organisation to benchmark

Find out about the organisation by gathering information using websites, government publications, or inquiring from specialists in the field.

a. Appropriate contact person(s) and information (names, positions, landline/mobile numbers, email addresses)
b. Background of the company or organisation
c. Awards, certifications, etc.
d. Details on the identified processes/systems for benchmarking

3. Manage administration & logistics needs for the activity

a. Prepare for activity
    - Preparation of letter for benchmarking activity with identified organisation
    - Preparation of benchmarking activity plan
    - Token/ certificate of appreciation
    - Others (e.g. attendance sheet, IDs, handouts, etc.)

b. Coordination for activity
   - Organisation team details for the activity (presenters and other participants involved, including management team in preparation for courtesy call if necessary)
   - Organisation information/ presentation and schedule for activity
   - Administration & logistics requirement (e.g., venue, meals, transportation, etc.)

4. Conduct the benchmarking activity

a. Pre-Benchmarking Activity
   - Briefing & Orientation of Participants
   - Alignment of expectations
   - Discussions on data/ information to be gathered
   - Discussions on how to conduct the benchmarking presentations, including the discussion flow and identification of roles

b. Actual Benchmarking Activity
   - Team Introductions and Courtesy Call
   - PGDdN Team presentation
   - Benchmarking Organisation's Team presentation
   - Question and Answer
   - Closing Activities (Closing remarks, PGDdN will deliver message of appreciation and present a token, etc.)

c. Post-Benchmarking Activity
   - Debriefing/Integrating learning (impressions, application in the workplace, timeframe, etc.)
   - Sharing of learning
   - Identifying what practices may be applied to PGDdN L&D

A benchmarking plan template is shown below:

BECHMARKING ACTIVITY PLAN

Activity Description:

This activity shall enable participants to benchmark with the identified organizations' Human Resource Development (HRD) processes specifically competency-based learning and development system and learn from their sharing of best practices.

Learning Objectives:

By the end of this benchmarking activity, the participants shall be able to:

1. Identify best practices of identified organisations in their CBLDS that can be applied in the PGDdN; and
2. Identify/ plan out next steps that will enable PGDdN to apply learning and initiate improvements in our L&D processes

Target Participants:

Selected Provincial Government of Davao del Norte Participants

Day/ Time	Learning Objectives	Session/ Activity	*Expected Outputs**	Topic/Content Highlights	Teaching / Learning Methodology	Resource Person/ Learning Team

A sample letter is shown below:

January 15, 2015

Dear Ms. ________________:

Greetings!

In line with the project "Strengthening Management of Provincial Government of Davao del Norte's Human Resources Development (HRD) – Learning and Development Services" (PGDN L&D) in partnership with the Government of Australia through the Philippines Australia Human Resource and Organisational Development Facility (PAHRODF), we would like to request permission to benchmark with **(your organization)** on your Human Resources and Organizational Development processes, particularly in Competency-based (CB) Learning and Development. The benchmarking activity's objective is to allow selected officials and employees of Davao del Norte Provincial Government to compare our L&D processes and practices with those of organizations that have competency-based L&D–HRD systems and learn from the sharing of best practices.

Our group consists of **(insert number of group and office)**, and would like to visit your organization on **(insert date and time)** to discuss best practices in L&D. We sincerely hope that you can accommodate us on this day. We will appreciate very much if your Human Resources Department can provide us with information on the following: (1) Overview/ Background of the organization; (2) L&D Programs and Practices; (3) Challenges/ Gains. Our group will ask questions and share their own experience and practices in L&D.

We look forward to your positive response. May we call your Office to confirm acceptance of said request or any other possible arrangements? Should you wish to have someone contact us for more information, we may be contacted through **(insert contact numbers and email address)**.

Very truly yours,

(Insert signatory)

For more information, please visit
http://www.isixsigma.com/methodology/benchmarking/benchmarking-ten-practical-steps-review-points/

ANNEXES

ANNEX A: SAMPLE TNA REPORT

The following is an excerpt from the L&D Needs Analysis Report of the Problem Solving Group:

TNA REPORT
on Managing Performance
Strengthening Management of PGDdN's HRD Learning and Development

I. Background and Rationale

The Provincial Government of Davao del Norte has formulated its 3-Year Competency-Based HRD Plan which indicates the priority HR needs that covered eighteen (18) department/offices of the PLGU. It also identified the learning and development (L & D) interventions responsive to the L & D requirement of the LGU's priority reform agenda.

The TNA for Managing Performance particularly Component B: Development Session in Workplace Effectiveness, as one of the identified priority intervention, is being done to determine the competency gap of the target participants and to respond to the learning needs of the group. It covers all PG Department Heads and PG Asst. Dept. Heads of the Provincial Government Offices.

II. TNA Objectives

- Identify the learning topics to be provided to the participants to be covered in the learning intervention.
- Identify suitable learning methods and activities based on target participants' learning styles.

III. Stakeholders

PG Department Heads and PG Asst. Dept. Heads of the provincial government offices

IV. Methodology

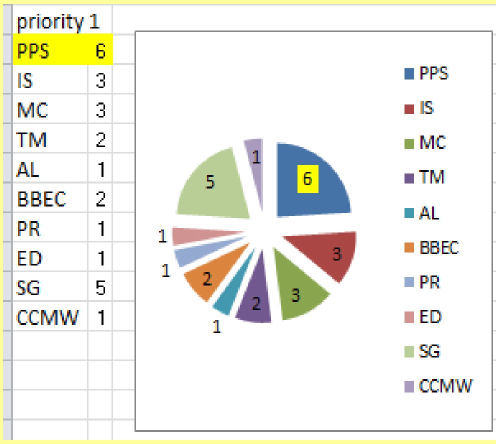
The primary instrument used in the TNA was a survey questionnaire. It was administered to 28 PG Dept. Heads and PG Asst. Dept. Heads. The questionnaire consisted of two parts – part one was the profile of the respondents and part two was the L&D needs of the respondents. On the first part, the respondents were asked to provide information on name, office, position, sex, age, and educational attainment. On the second part, the respondents were asked to rank the items of their L&D needs according to their priority, from 1 as the first priority and last number as the last priority, from the list provided in the questionnaire. Frequency counts and percentages were applied in presenting the profile of the respondents. Data obtained from the L&D needs assessment of the respondents were analysed using the frequencies and ranking.

V. Demographic Profile of Respondents

A total of 24 PG Department Heads and PG Asst. Departments participated in the survey in which 6 (25%) were males and 18 (75%) were females. As for the educational attainment, 7 (29%) are college graduate, 13 (54%) have Post- Graduate Degree and 4 (17%) are Doctorate Degree holder. As for the age, many of the respondents were at the age bracket of 56-60 years old at 38 %, followed by age bracket of 51-55 years old at 25%. It was closely followed by 21% by the 46-50 years old bracket.

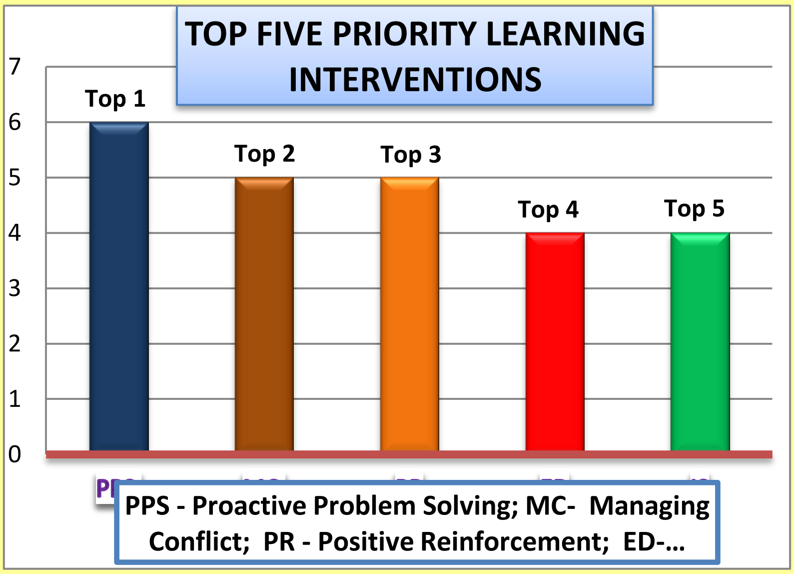
VI. TNA Survey Results

Priority 1 – Pro-active Problem Solving



Of the actual 25 Respondent Department Heads and Asst. Department Heads, 6 or about 24% of the respondents prioritised Pro-active Problem Solving necessary to achieve Workplace Effectiveness. Of the ten (10) listed competencies, Pro-active Problem Solving topped the selection by the respondents placing this competency the top priority.

VII. TNA Survey Summary



TNA Summary Graph

The TNA Summary graph at the left illustrates the top five priority interventions identified by PG Department Heads and PG Asst. Department Heads in addressing their major competency gaps as indicated in the TNA survey. Results revealed that majority of the respondents ranked Proactive Problem Solving as their top one priority need in enhancing their competencies.

VIII. TNA Validation

Probing interview with selected PG Department Heads and PG Assistant Department Heads were conducted in the first week of November, 2014 to validate the results of the TNA survey.

Validation Interview (responses by selected Respondents)

1. Understanding Problem-solving

   – Problem in the implementation of activities
   – Strategies or methodologies in problem solving
   – Problem in managing conflict in the workplace
   – Handling individual attitude, stubborn and indifferent employees
   – Resolved with mentoring and coaching, SWOPT analysis in implementing programs/project

IX. Recommendations

The TNA Survey and Validation Interview results justifies the recommendation that there is a need for learning and development interventions that will respond to the priority learning needs of the PG Department Heads and PG Asst. Department Heads pertaining to Performance Management. Further, this will be the basis in designing the L&D plan for the Pro-active Problem Solving to address Workplace Effectiveness.

ANNEX B: COURSE BRIEF SAMPLE

Training Design and Development Workshop
Program for Learning and Development

Workshop Description:
This workshop shall enable participants to translate training needs into learning objectives leading towards the design and development of the appropriate learning interventions. It shall also enable participants to administer the designed learning interventions through appropriate pre-course, course-proper and post course activities. The necessary competencies shall be built through actual application of principles, processes and practices using facilitated discussions and activities embedded in the workshop.

Learning Objectives:

By the end of this workshop, the participants shall be able to:
1. Develop a training philosophy and a curriculum framework;
2. Process training needs data into organisational, performance, learning and learning environment needs;
3. Design a courses that will address identified learning needs;
4. Develop materials that will support the implementation of the designed courses; and,
5. Prepare a checklist and necessary collaterals to prepare for course implementation.

Target Participants:
Selected officers and staff from the PGDdN Human Resource Management and Development Office (PHRMO).

Workshop Content:
1. Introduction
2. Training Philosophy and Curriculum Framework
3. Alignment of Training Needs
4. Course Design
5. Training Materials Development
6. Training Administration
7. Integration

Design Matrix Sample
Training Design and Development
PGDdN Program for Learning and Development

Day/Time	Learning Objectives	Session/ Activity	Expected Outputs	Topic/Content Highlights	Teaching / Learning Methodology	Nominated Facilitator	Resources Needed
Day 1: 0830-0945	Pax shall be able to: • Relate own expectations to workshop objectives • Agree on workshop norms • Express personal learning objectives	Introduction	• Participant Expectations • Workshop Norms and Objectives • Participant learning objectives	Workshop Objectives: (*See Workshop Brief above for the objectives*)	• Opening Ceremonies ○ Opening Prayer ○ Philippine Anthem ○ Australian Anthem ○ Welcome Remarks • Workshop Objectives • Expectation Setting and Norming • Participant Learning Objectives		• Laptop • Projector • Screen • Cluster Seating-Tables for 5 to 6 pax
Day 1: 0945 – 1000		AM Break					
Day 1: 1000 – 1200	Pax shall be able to: • Appreciate the role of learning and development in supporting organisational transformation • Develop a draft philosophy and curriculum	Training Philosophy and Curriculum Framework	• Draft Training Philosophy • Draft Curriculum Framework	• Learning and Development Needs • Learning and Development Solutions • Training Philosophy • Training Curriculum	**Case Study 1: Learning and Development Needs** • Corporate Realities • HRD Realities **Case Study 2: Learning and Development Solutions** • HRD		• Case Study 1: Learning and Developmen t Needs • Case Study 2: Learning and Developmen t Solutions

Day/Time	Learning Objectives	Session/ Activity	Expected Outputs	Topic/Content Highlights	Teaching / Learning Methodology	Nominated Facilitator	Resources Needed
	framework				Solutions • Development Center **Facilitated Workshop** • Training Philosophy • Training Curriculum		

Annex C: Sample List of Training Activities

Rapid Instructional Design
George M. Piskurich

Anonymous Questioning. Trainees are asked to write their main question on a sheet of paper and pass it to the facilitator, who then reads the questions, and may answer them or ask for responses from other trainees.

Behaviour Modelling. A technique in which effective behaviours are shown to the trainees with an outline of how to repeat the behaviours step by step. The trainees try out and practice the behaviour with guidance and feedback. Used commonly in interpersonal skills and communication training.

Brainstorming. An idea-generation process in which a spontaneous non-judgmental flow of suggestions is facilitated. Later the ideas are explored in detail and their usefulness evaluated.

Buzz Session. A small informal group discussion.

Case Study. A written, oral, or video account of a situation given to trainees. Either individually or in groups, the trainees are asked to analyse the case and present recommendations.

Colloquy. A modification of a panel in which half the group are trainees and the other half experts. The trainees ask questions, raise issues, and make comments for the experts to respond to.

Committee. The creation of a number of smaller groups from a large group of trainees, each of which is responsible for solving a particular aspect of a general problem. Through reports and feedback the general problem moves toward solution.

Critical Incident. A variation of the case study in which trainees are given incomplete data. By analysing the case and asking the right questions, they are given additional data needed to solve the case.

Critique. Trainees are asked to analyse the strengths and weaknesses of a particular process and to make suggestions for improvements.

Debate. Two teams defend opposite sides of an issue. The purpose is to explore all aspects of an issue and not necessarily to win.

Demonstration. Trainees observe the performance of a task or procedure as conducted by an expert, either live or tape.

Dialogue. Two individuals hold a conversation while the trainees observe. The conversation may present opposing views of a situation or simply be an exploration.

Discussion. An exchange of ideas between the facilitator and the trainees. It can be totally unstructured and spontaneous, but usually requires some structure to achieve a content-related purpose.

Drill. Repetitive practice designed to increase efficiency, improve the quality of performance, or aid retention.

Fishbowl. A large group is divided into two smaller groups with one group discussing or role playing an issue while the other observes and then offers feedback.

Forum. Trainees discuss and ask questions about a presented topic. They may ask questions of the speaker or discuss the topic among themselves.

Game. A structured exercise in which competition or cooperation [or both] are used to practice principles or le arn new ones.

Instruments. Questionnaires, checklists, or other forms filled out by trainees concerning themselves or others, usually to gain insight about themselves or a topic.

Interview. Trainees question a resource person to add to content knowledge or develop new approaches.

In-Basket. Prepared items that are given to the trainees as if arriving in their in-baskets. Trainees must prioritize, make decisions, handle any difficulties, and respond to time deadlines and pressure, etc. in order to complete the work.

Job Aids. Items given to trainees to assist them in doing their jobs. They might include: worksheets, checklists, samples, flow charts, procedural guides, glossaries, diagrams, decision tables, manuals, and other items. Training is often needed to help the workers employ the job aids.

Laboratory. A training area set up to allow experimentation, testing, and hands-on experience by trainees. The processes occurring here may be extremely structured, totally unstructured, or anything in between, depending on the content.

Lecture. A prepared oral presentation by a qualified speaker.

Lecturette. A brief lecture, usually designed to cover a single aspect of a topic and lead into a discussion, games, or some other activity.

Listening Team. Groups of trainees assigned to listen to a presentation, take notes, prepare questions, and then summarize a session. Each group is asked to focus on a different aspect of the presentation and report observations and conclusions.

Mental Imagery. Allowing the trainee to relax and imagine doing the process that has been discussed. Also useful for quick stress breaks or as a transition when changing subjects.

Mind Mapping. A technique that allows capturing natural flow of ideas.

Mini-Case. A case study in which the situation is described briefly to the trainees, who discuss how it might be handled. Often only one or two key facts are given, and usually the discussion is brief. Used to give examples of situations and procedures

Missing Panel. A vacant chair that trainees can temporarily take to participate briefly in the panel discussion.

One-on One Discussion. A method in which the trainees are asked to speak to the person beside them for a few minutes to discuss an issue, answer a question, or generate questions to ask.

Panel. A discussion among a group of experts that takes place while trainees observe.

Practice Exercises. Trainees are to practice performing a task.

Question and Answer. The facilitator covers content by asking a series of questions. Can be reversed and have the trainees generate the answers to the questions.

Quiz. A practice activity of completing the answers to oral or written questions. Often used as a summary activity.

Reading. Materials assigned for trainees to read that cover course content or otherwise prepare them for further activities.

Reflection. Trainees are given time for singular thought to consider what has been learned and its applicability in their work settings.

Role Play. Trainees enact a situation in order to try out new skills or apply what has been learned. Role plays might include:

- ***Confrontation***: In which the trainee is confronted by another person and must handle problems or provide satisfaction.
- ***Court Technique***: In which a situation or person is "tried" as trainees work out the consequences of a mishandled task
- ***Monologue***: In which there is only one role and the player gives it while trainees observe.
- ***Triads***: In which three trainees take on the roles of two individuals and an observer, often rotating roles.
- ***Role Reversal***: In which the players assume the roles of others whom they normally interact with on the job.

Simulation. A training environment set up to allow the trainees to practice a task under conditions as close to those on the job possible.

Skit. A short, dramatic presentation that is carefully prepared and rehearsed to illustrate principles or provide material for analysis and discussion.

Structured Learning Experience/ Exercise. An experiential activity designed for the trainees to practice a task under certain conditions with an identified initially undisclosed purpose such as self-awareness or understanding, perceptions or assumptions, etc.

Annex D: Sample List of Instructional Games

Rapid Instruction Design, George M. Piskurich

Action Learning. A combination of action and reflection by a team to solve complex, strategic problems in real-world organisations. Exiting skills and knowledge are applied, and new skills, knowledge, and insight created through continuous reflection and questioning.

Board Games. Modelled after games such as Monopoly, Chutes and Ladders, and so on. Board games use game cards and dice to encourage individuals and teams to demonstrate mastery of concepts, principles, skills, and problem- solving strategies.

Card Games. These games involve facts, concepts, technical terms, definitions, principles, examples, quotations, and questions printed on cards. Good for classifying and sequencing pieces information.

Case Studies. Usually a written (sometimes video) account of a real fictional situation surrounding a problem. Participants work individually or in teams to analyse, discuss, and recommend appropriate solutions and to critique

Cash Games. These games use cash transactions for the development of interpersonal skills.

Computer Game Shells. Games that permit the loading of new content (usually questions) by the facilitator during the game.

Experience-Based Learning. Physical activities and challenges such as rafting, rock climbing, walking on rope bridges, and so on, in regulated outdoor environments, used to build team reliance and self-reliance as well.

Frame Games. Game templates that allows content to be replaced to create new games.

Interactive Storytelling. Fictional narratives in which participants listen to a story and make appropriate decisions at critical junctures.

Kinaesthetic Learning Devices. Physical activities performed on electrical and mechanical equipment specially developed for a particular challenge or to make a specialized point. The best of these are often directly related to the workplace.

Magic Tricks. Tricks that can be used to provide metaphors or analogies for some important element of the content.

Metaphorical Simulation Games. These simulations provide a simplistic abstract view of real-word processes. They are good for teaching principles related to planning, generating ideas, testing alternatives, making decisions, utilizing resources, and working under time pressure.

Puzzles. These can be used to preview, review, or test content for individuals or groups.

Read. Me Games. Participants read a handout and play a game that uses team support to encourage recall and transfer of what they read.

Role Plays. Participants act out characters, and attitude other than their own. Often used to reverse roles in supervisory training.

Television Games. Structured like popular game shows, they are used to present content and to drill on concepts and terminology.

Thought Experiments. Participants mentally rehearse new patterns of behaviour by placing themselves in unique mental situations, such as holding discussion with George Washington to find out how he would solve a problem or interviewing one's self. Through this process, new knowledge and insight are often gained.

Video Replay Games. Participants watch a videotape that presents content through a game situation, and then replay the game live to apply the concepts and skills.

ANNEX E: BLOOM'S TAXONOMY

Types	Levels	Key Words
Cognitive: Acquisition of knowledge or intellectual skills.	Knowledge – Recalling data or information that was presented	Recall, Recite, List, Name, Label Identify, Recognize, Select
	Comprehension – Giving meaning to data or information presented	Explain, Discuss, Summarize, Interpret, Defend
	Application – Using data, information or concept in own situation	Use, Apply, Relate, Demonstrate, Operate, Compute, Solve
	Analysis – Breaking down ideas or concepts into component parts	Analyse, Breakdown, Investigate, Explore, Examine, Question
	Synthesis – Recognizing patterns/ structures from diverse elements	Combine, Compose, Create, Infer, Integrate
	Evaluation – Making judgments about ideas and concepts	Discriminate, Assess, Evaluate, Criticize, Justify, Conclude
Affective: Creation of an emotional response	Receiving – Being aware and willing to accept ideas/ concepts	Mention, Express, State, Discuss, Enumerate, Choose, Use
	Responding – Participating and being involved in activities	Participate, Present, Perform, Practice, Comply, Be involved
	Valuing – Expressing preference for ideas, concepts or activities	Commit, Initiate, Propose, Justify, Share
	Organizing – Differentiating and prioritizing values	Decide, Prefer, Prioritize, Defend, Recommend
	Internalizing – Value are consistently manifested in behaviour	Model, Advocate, Manifest, Demonstrate
Psychomotor: The use and coordination of physical movement	Perception – Using sensory cues to guide motor skills	Detect, Select, Identify, Differentiate
	Set – Providing pre-determined responses to specific situations	Begin, Proceed, Display, Show, Demonstrate
	Guided Response – Performing under close supervision	Follow, Repeat, Imitate, Respond, React,
	Mechanism – Performing consistently to specific situations	Organize, Assemble, Manipulate, Calibrate, Construct, Perform
	Complex Overt Response – Performing skilfully	Organize, Assemble, Manipulate, Calibrate, Construct, Perform
	Adaptation – Modifying performance for special requirements	Modify, Adapt, Change, Adjust, Revise, Contextualize,
	Origination – Creating new performance patterns	Originate, Create, Compose, Design, Develop

ANNEX F: M&E PLAN

Provincial Government of ____________________

Monitoring & Evaluation Plan for HRD Interventions*

Part 1: Background Info on the Intervention
Provide relevant information about the intervention.

Level of M&E	Indicators (What will you measure?)	Methods/ Tools	Data Sources	When to M&E?	Person/s Responsible
Level 4: Organisational Outcome					
Level 3: Application (in the workplace)					
Level 2: Learning					
Level 1: Learners' Reaction					

**Developed by Ma. Teresa B. Tolosa for the Provincial Government of Aklan as part of the PAHRODF intervention on Improving Delivery of HRD –L and D Services of PGAklan*

ANNEX G: SAMPLE LEVEL I EVALUATION TEMPLATE

Evaluation Sheet

Learning Session Title: ____
Activity Date & Venue: ____

Instruction: Please circle your response to each statement.		Strongly Agree	Agree	Disagree	Strong Disagree
Content Design					
1	The session objectives were clearly stated and achieved.	4	3	2	1
2	The teaching and learning methods used during the session helped me understand the concepts discussed.	4	3	2	1
3	Explanations were logical and clear.	4	3	2	1
4	Examples given were relevant.	4	3	2	1
5	The visual aids and other materials used (i.e. video, activity materials, etc.) helped in facilitating the learning process.	4	3	2	1
6	The handouts distributed were pertinent and useful.	4	3	2	1
Logistics					
1	The venue (including Air Conditioning, Space, Lights, Ventilation, etc.) was conducive for learning.	4	3	2	1
2	The food and refreshments were adequate and filling.	4	3	2	1
3	The training materials needed are readily available.	4	3	2	1
Facilitator 1: (Name ____)					
1	Displayed a thorough knowledge of the topics discussed.	4	3	2	1
2	Explained the benefits of applying the concepts taught.	4	3	2	1
3	Presented the concepts/topics in a logical and comprehensive manner.	4	3	2	1
4	Maintained participant's attention and interest.	4	3	2	1
5	Provided appropriate responses to questions and clarifications.	4	3	2	1
6	Helped enhance participant's knowledge and skills.	4	3	2	1
Facilitator 2: (Name ____)					
1	Displayed a thorough knowledge of the topics	4	3	2	1

	discussed.				
2	Explained the benefits of applying the concepts taught.	4	3	2	1
3	Presented the concepts/topics in a logical and comprehensive manner.	4	3	2	1
4	Maintained participant's attention and interest.	4	3	2	1
5	Provided appropriate responses to questions and clarifications.	4	3	2	1
6	Helped enhance participant's knowledge and skills.	4	3	2	1
Facilitator 3: (Name ____)					
1	Displayed a thorough knowledge of the topics discussed.	4	3	2	1
2	Explained the benefits of applying the concepts taught.	4	3	2	1
3	Presented the concepts/topics in a logical and comprehensive manner.	4	3	2	1
4	Maintained participant's attention and interest.	4	3	2	1
5	Provided appropriate responses to questions and clarifications.	4	3	2	1
6	Helped enhance participant's knowledge and skills.	4	3	2	1
Facilitator 4: (Name ____)					
1	Displayed a thorough knowledge of the topics discussed.	4	3	2	1
2	Explained the benefits of applying the concepts taught.	4	3	2	1
3	Presented the concepts/topics in a logical and comprehensive manner.	4	3	2	1
4	Maintained participant's attention and interest.	4	3	2	1
5	Provided appropriate responses to questions and clarifications.	4	3	2	1
6	Helped enhance participant's knowledge and skills.	4	3	2	1

What did you like best about the session?

____

____

What suggestions can you give to help improve the session?

____

____

Your evaluation and feedback on this workshop is greatly valued and appreciated. Thank you!

ANNEX H: IMPLEMENTATION CHECKLIST TEMPLATE

FUNCTIONS AND TASKS OF AN L&D ADMINISTRATOR
Intervention Checklist

STAGE	ADMINISTRATIVE	TECHNICAL
Pre-Implementation	• Proposal - transportation - honoraria - food and communication - supplies and materials - contingency fund • Approval of the training design • Preparation of Special Orders • Selection of venue • Selection of menu • Sending out of invitations - Contracting resource persons - Preparing TORs - speakers (including topics/ outline of program) - participants • Profiling of participants • Procurement of supplies and equipment • Secretariat • Training materials preparation - reproduction of materials • Organises training team—task, role assignment, role distribution • Counter check preparations made	• TNA • Design formulation - title - objectives - course content - schedule - target participants/resource speakers - methodology - evaluation scheme (training program, resource speakers, pre and post tasks - evaluation instrument • Training materials preparation - selection of readings/handouts - audio visual aids preparation - session guide/flow of activity - faculty orientation/briefing with staff
Implementation	• Supervises the registration • Facilitates check-in • Facilitates the opening ceremonies	• Creates the learning environment • Observes time management/blocking

	• Introduces the Resource Persons • Documentation of training • Clear house - participants' payment • Closing program - impressions from participants - results of evaluation - distribution of certificates (training and certificates of appearance) • Collection of outputs • Departure arrangements - checking out - transportation	• Manages and monitors the learning process • Recaps and links the previous activities • Provides time-fillers • Temperature checking every now and then • Critiquing (day to day after each module)
Post-Implementation	• Folio preparation - venue - resource persons • Settling of accounts • Debriefing of training staff • Inventory and safe keeping of extra materials	• Terminal report preparation/submission • Analysis of evaluation • Recommendation of subsequent conduct • Monitor and follow-up

ANNEX I: COMMUNICATION PLAN TEMPLATE

Communication and Marketing Objectives

Key Audience/ Stakeholder	Key Messages	Method/Channel	When	Who (Responsible)

ANNEX J: L&D REPORT TEMPLATE

Learning & Development Report
Course Title
Implementation Date(s)

Program Title:			
Course Title:			
Category: ☐ In-House ☐ Out-Sourced ☐ Others:	Target Class Size:	Actual Class Size	
Training Administrator			Rating:
Facilitator 1:			Rating:
Facilitator 2:			Rating:
Facilitator 3:			Rating:

Summary of Training Evaluation:

Evaluation Level 1			
Facilitator	Rating	Evaluation Level 2 (Pre-Test)	% Passing:
Administrator	Rating	Evaluation Level 2 (Post-Test)	% Rating
Design	Rating	Evaluation Level 3:	% Rating
Materials	Rating	Remarks:	
Over-All Average	Rating		

Summary of Expenses:

Expense Items	**Budget**	**Actual**	**Remarks:**
Consultant's Fee/Honoraria			
Materials and Supplies			
Function Room/Venue			
Meals			
Accommodation			
Equipment Rental			

Transportation			
Miscellaneous:			
Total			

Highlights of Proceedings:

Analysis/Conclusions/Recommendations:

Attachments:

☐ Administrator's Checklist Results
☐ Documentation of Proceedings
☐ Participant List with Grades
☐ Outputs:
☐ Detailed Evaluation
☐ Others:

Submitted by:	Date Submitted:	Reviewed by:	Date Reviewed:

DEFINITION OF TERMS

1. **Change Management – "**approach to managing change to transition individuals, teams, and organisations to a desired future state[11]"
2. **Competency** – "a combination of motives, traits, self-concepts, attitudes or values, content knowledge or cognitive behaviour skills[12]"
3. **Competency Assessment** – a means for the qualification and measurement of demonstrated competency through assessment such as a questionnaire
4. **Course** – "a complete integrated series of lessons which are identified by a common title and/or number[13]"
5. **Curriculum** – "a set of courses constituting an area of specialization[14]"
6. **Facilitation** – a process which provides support and/or guidance in different situations[15]
7. **Human Resource Development Plan** – according to PGDdN's Strategic Competency-based Human Resource Development Plan 2014-2016, HRD Plan is "gender-responsive, developmental instrument, equipped with enabling policies, financial resource and mechanisms to engage its stakeholders in plan execution and monitoring"
8. **Knowledge, Skills & Attitude**
    - **a.** **Knowledge** – "the sum of what is known : the body of truth, information, and principles acquired by humankind[16]"
    - **b.** **Skills** – "the ability to use one's knowledge effectively and readily in execution or performance[17]"
    - **c.** **Attitude** – "a feeling or way of thinking that affects a person's behaviour[18]"
9. **Learning & Development** – Learning is "the process through which we acquire new information or build on information previously learnt[19]" and development is "the progressive series of change in something.[20]" Learning and development is "a function of human resource management concerned with organisational activity aimed at bettering the performance of individuals and groups in organisational settings[21]."

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[11] Change Management (n.d.)
[12] Spencer, McClelland, and Spencer (1994)
[13] Clark, D.R. (2012). Definition of Competency.
[14] Curriculum (n.d.)
[15] Facilitation (n.d.)
[16] Knowledge (n.d.).
[17] Skill (n.d.).
[18] Attitude (n.d.).
[19] Learning (n.d.)
[20] Development (n.d.)
[21] Learning and Development (n.d.)

10. **Learning & Development Management System** – ensures that all components that contribute to Implementing learning interventions are aligned with each other and are well coordinated
    a. **Learning & Development Needs Analysis** – discloses the individual learning needs of an identified group of learners
        i. **Learning & Development Needs Assessment** – done to determine the causes of performance/competency gaps, and whether an L&D intervention is necessary and appropriate to address the gap
    b. **Learning & Development Design & Development** –design phase consists of "learning objectives, tests, and the required skills and knowledge for a task are constructed and sequenced[22]" while development phase is to "develop and validate the instructional material (courseware)[23]"
    c. **Learning & Development Plan** – specifies how the different stakeholders in the organisation will be trained and developed to enable them to achieve desired results
    d. **Learning & Development Intervention Implementation** – "instruction is delivered to the learners during this phase[24]"
    e. **Learning & Development Intervention Monitoring & Evaluation** – Through proper monitoring and evaluation, the significance and importance of the learning intervention is proven and reinforced. Monitoring is the systematic process of supervising L&D activities to ensure they are proceeding as designed, and are on schedule to be able to meet stated objectives and performance targets. The data acquired through monitoring is used for evaluation.
11. **Needs**
    a. **Environment Needs** – needs that are required for the organisation to better respond to outside forces that can potentially affect its performance
    b. **Learning Needs** – in preparing L&D interventions, these are the requirements or what the learner needs to know in order to better accomplish their job/task[25]
    c. **Organisational Needs** – uncovered through the process of strategic planning and organisational needs assessment, when organisational results are compared with strategic objectives
    d. **Performance Needs** – determined through performance analysis by comparing the desired and actual performance of employees through a competency assessment
    12. **Needs Analysis** – determine needs by reviewing work tasks, identifying performance factors and objectives, and defining training objectives and recommendations[26]

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[22] Clark, D.R. (2010). Definition of Design Phase.
[23] Clark, D.R. (2010). Definition of Development Phase.
[24] Clark, D.R. (2010). Definition of Implementation Phase.
[25] Clark, D.R. (2010). Definition of Learning Needs.
[26] Clark, D.R. (2010). Definition of Needs Analysis.

a. **Learning Needs Analysis** – process of determining an L&D need or "a study of the types of training needed by an organization's employees[27]"
b. **Training Needs Analysis** – disclose individual learning needs of an identified group of learners

13. **Performance Analysis** – "begins with the desired results that should be accomplished in the future[28]"
14. **Program** – "a group of activities or things to be achieved[29]"
15. **Presentation** – "a prepared spoken communication made to deliver a specific persuasive message to a specific audience[30]"
16. **Training** – learning that is provided in order to improve performance on the job[31] or as defined by Manpower (1981), it is "a planned process to modify attitude, knowledge or skill behaviour through learning experience to achieve effective performance in an activity or range of activities. Its purpose in the work situation is to develop the abilities of the individual and to satisfy the current and future manpower needs of the organization[32]"
17. **Workplace Development Objectives** – the objectives of an intervention which "identify expected changes in individuals, institutional processes and systems, and benefits[33]"

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[27] Training Needs Analysis (n.d.).
[28] Watkins, R., Meiers, M.W., and Visser, Y.L. (2012)
[29] Program (n.d.)
[30] Presentation (n.d.)
[31] Clark, D.R. (2010). Definition of Training.
[32] Reid, Barrington, and Brown (2004).
[33] Workplace Development Objective. (n.d.).

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