

TRAINERS

Planning for
SUCCESS

Effective project planning and evaluation in biomedical research

TRAIN-THE-TRAINER



World Health
Organization

Special Programme for Research & Training
in Tropical Diseases (TDR) sponsored by
UNICEF/UNDP/World Bank/WHO



Effective project planning and evaluation in biomedical research

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About the train-the-trainer manual

The skill-building course in *Effective project planning and evaluation in biomedical research* has been developed by the UNICEF/UNDP/World Bank/WHO Special Programme for Research and Training in Tropical Diseases (TDR) for biomedical researchers in developing countries. Its aim is to strengthen their skills in the organization and management of research projects so as to achieve effective implementation and successful collaboration and in this way increase competitiveness in accessing available funding.

During the four-day course participants work on their own project and go through the various steps of project management. They carefully define and analyse their project, and establish a complete project development plan. They understand how to use the plan first to implement the project on time, under a given budget and within agreed standards, and then to monitor, evaluate and report.

The value of teamwork and its processes is highlighted and discussed.

The train-the-trainers course, developed in collaboration with the South African Medical Research Council, Cape Town, South Africa, ensures that competent trainers are available to facilitate the integration of the skill-building course in developing countries.

The support training material for these interactive courses includes the following:

- *Training manual for participants*
- *Step-by-step guide for participants*
- *Training manual for trainers*
- *Step-by-step guide for trainers*
- *Train-the-trainers manual*

The present handbook is the *Train-the-trainer manual*. Its content follows carefully the presentations covered during the train-the-trainer (TTT) course. Starting with the introduction and overview of the train-the-trainer course, it then provides some practical tips to strengthen presentation skills and training skills and prepare for and organize a coming skill-building course. All slides are provided, and each presentation is preceded by the related text.

This manual is intended to be used:

- during the train-the-trainer course, to support potential trainers in following the presentations and taking notes and as a reference during the training sessions
- for the preparation of a coming skill-building course
- during the skill-building course, to give the trainers support in facilitating the course.

Introduction and overview of the train-the-trainer course

BACKGROUND AND RATIONALE

The need for capacity development for effective project planning and evaluation in biomedical research has been recognized by both researchers and funding agencies. To this end, the UNICEF/UNDP/World Bank/WHO Special Programme for Research and Training in Tropical Diseases (TDR) has developed a skill-building course on this subject.

Skill-building course

It is important for trainers to understand the objectives of the course on *Effective project planning and evaluation in biomedical research* which, for clarity, is referred to in this handbook as the “skill-building course”. Potential trainers will themselves have participated in the skill-building course, and this section is intended as a reminder of its content and objectives. See box “The skill-building course” below for a summary of the training methodology, desired outcomes and expectations of the skill-building course.

The skill-building course

1. What are the goal and objectives of the skill-building course?

- To strengthen the skills of biomedical researchers in developing countries to enable them to organize and manage their projects more efficiently for successful implementation and collaboration and to become more competitive in their research grant applications.

2. What is the focus of the training?

- The training raises awareness of good practices in biomedical research and the value of project planning in managing a research project. In addition, approximately 80% of the time is spent on experiential learning, with participants going through all steps of project management using their own projects; skill development is a major component of the training.

3. What is the training methodology for the course?

- The training methodology is based on the “experiential learning cycle” theory developed by Dr David Kolb. Participants apply, step-by-step, the planning and evaluation process to their own project and learn by doing and reflecting.

- › The course is designed for adult learners who arrive with their own world view, experiences and expectations. They come with the intention of learning and need to be kept motivated.
- › They learn best when they are actively involved, can participate fully and when the training provides practical benefits for their work.

4. What is the immediate outcome of the course?

- › At the end of the course, each group will have analysed its own project, defined clear strategic outputs and established a realistic project development plan (Gantt chart and PERT chart) including activities, milestones, timelines and resources. Participants will understand the need for and be familiar with the process of constant monitoring, communication and evaluation during the conduct of the project. A draft communication and team work strategy will be established. These skills prepare investigators to work effectively with the project team and reach the objectives of their project within the expected quality, budget and time criteria.

5. What is expected to change for the researcher participants who undertake the training?

- › Increased awareness of the value of good practices, project planning and planning tools in organizing and conducting a research project.
- › Increased skills and confidence to organize and conduct research projects effectively, to enhance team work and be successful in their collaborations.

6. What will be the impact of this training on individuals, groups and organizations?

- › Greater success in grant applications from funding agencies.
- › Improved project management and effective implementation of research projects.
- › Increased collaboration.
- › More effective collaborative research.
- › More publications in peer journals.

7. Who are the target participants for the skill-building courses?

- › Biomedical researchers and other health researchers from developing countries.

8. How many participants will be trained?

- › Ideally, twelve participants per course, working in four groups.
- › Each group has three participants working on one project. This allows adequate interaction between participants.

A sustainable training programme

When the skill-building course was conceived, its main target participants were TDR grant recipients. However, the need to extend the course to a broader audience, making it available to as many researchers/institutions as possible, was soon realized. To this end, the related train-the-trainer (TTT) course has been developed to ensure that competent trainers are available in different countries and regions to facilitate local skill-building courses for effective project planning and evaluation in biomedical research.

TRAIN-THE-TRAINER COURSE – GOAL AND OBJECTIVES

The **goal of the train-the-trainer** course is to strengthen the skills of selected individuals from academic and research institutions in developing countries, to enable them to train researchers to plan, implement, monitor and evaluate biomedical research projects effectively.

More specifically, the **training objectives of the train-the trainer course** are:

- to ensure that the process of project planning and evaluation has been assimilated and the related skills have been strengthened
- to enhance abilities and confidence to transfer these skills to researchers
- to strengthen presentation skills
- to strengthen training skills
- to strengthen course organization capabilities.

PARTICIPANTS

Selected individuals who have undergone prior training on the course on *Effective project planning and evaluation in biomedical research* will be invited to undergo training to become trainers for the skill-building course.

The optimal number of participants in the train-the-trainers course is six, in order to allow sufficient time for each participant to practise the necessary skills.

The selection is based on the following criteria.

Musts

- Attendance at the skill-building course (to become familiar with the training content and methodology).
- Application of the methodology to their daily work and developed skills in project planning and evaluation in biomedical research.

- › Basic computer skills and ability to use basic features of *Microsoft Project* and *PowerPoint*.
- › Interpersonal skills.
- › Proficiency in the language of the course and training materials.
- › An interest in transferring this knowledge and related skills to other researchers.
- › Availability to run at least one skill-building course per year, i.e. two full weeks including organization, the course itself and follow-up.

Added advantages

- › Demonstrated receptiveness to (i.e. understanding and endorsement of) the project planning and evaluation concept and the methodology used on the skill-building course.
- › Teaching and research experience.
- › Support from the home institution (time and interest in training).

LEARNING PROCESS

- › The first step of the learning process takes place during and after the skill-building course that the potential trainer attends, as she/he applies the methodology learned there to her/his daily research work.
- › The second step of the learning process happens at the train-the-trainer course, as the potential trainer enhances her/his presentation, training and organizational skills.
- › During the third step, potential trainers practise "at home" the skills learned during the train-the-trainer course and ensure they have understood and internalized the training content and methodology used, and feel confident to transfer it to others.
- › The fourth step focuses on the preparation, organization and conduct of their first skill-building course, co-training with a skilled trainer.
- › Experience will then bring the confidence to run skill-building courses.

TRAINING CONTENT

The train-the-trainer course comprises the following sessions:

› Presentation skills

Potential trainers are introduced to some general tips for giving a presentation and to their application in the context of the skill-building course.

› Going through the training materials

The materials for trainers are presented and reviewed with a specific focus on the tips and notes provided for trainers in the *Training manual for trainers* and *Step-by-step guide for trainers*.

› Training skills

This theoretical session provides additional information and tips on facilitation, communication and group management skills in the context of the skill-building course.

› Practice

During this two-day practice session, each potential trainer has the opportunity to:

- present one module of the skill-building course
- go through the *Microsoft Project* and *PowerPoint* software demonstrations
- facilitate presentations and discussions
- reflect and provide comments on real examples of project documentation developed during previous courses.

These activities simulate the relevant sessions of the skill-building course.

› Prepare yourself for a coming skill-building course

During this session, the potential trainers are given practical tips for preparing themselves and feeling confident to run a skill-building course.

› Organizing a skill-building course

Potential trainers receive guidance on how best to organize the skill-building course, using a checklist of administrative steps that need to be accomplished before the course, and a checklist for preparing the report after the course.

These sections are organized over 4 days as shown in table 1 (next page).

Table 1 The train-the-trainer course agenda

	Day 1		Day 2		Day 3		Day 4
AM	Welcome		Training skills		Practice Module presentation, facilitation & software demonstration		Practice Module presentation, facilitation & software demonstration
	Introduction & overview of the TTT Course		Going through the step-by-step guide				
	Presentation of the training materials						
	Presentation skills		Practice Module presentation, facilitation & software demonstration				
	Going through the training manual						
PM	Going through the training manual		Practice Module presentation, facilitation & software demonstration		Practice Module presentation, facilitation & software demonstration		Prepare yourself for a coming course
							Organizing a course
							Course Assessment & next steps
							Close

TRAINING MATERIALS

The following training materials have been developed to support the participants of the skill-building courses.

Training manual for participants

Its content carefully follows the presentations made at the skill-building course. Starting with an introduction and overview of the course it then gives an overview of good practices in biomedical research; highlights the concept and the value of planning; and presents the various steps of project management: defining the purpose and the scope of a project, establishing a project development plan and project implementation, monitoring, reporting and evaluation. All the slides to be shown are provided, and each presentation is preceded by the related text. This manual is meant to give participants support during the course, helping them to follow the presentations, to take notes and to be a reference at any time during the training sessions. It may also be used by participants once they are back home as they work on their current project(s) and later, on new projects.

Step-by-step guide for participants

It is designed to guide the participants through each step of the project planning and evaluation process. It gives step-by-step practical support during the case study sessions at the course (modules 3 to 5). It may also be used by participants after the course as they work on their current project(s) and later, on new projects.

CD-ROM for participants

A CD-ROM has been developed to support participants:

- during the course
- after the course when they apply the skills to their daily work
- in introducing the course to their team and institution.

The following materials have been developed to support the trainers of the skill-building course. They are also key training materials for the train-the-trainer course:

Training manual for trainers

This has the same content as the *Training manual for participants*, providing all the slides used in the skill-building course and their accompanying text. In addition, it provides trainers with practical tips, which are presented at the bottom of each slide. These tips are intended to support the trainers for the presentation of the theory element of the modules. They are only suggestions and should NOT, in any circumstances, limit the flexibility and creativity of trainers in reaching the course objectives.

Step-by-step guide for trainers

This has the same content as the *Step-by-step guide for participants*, taking participants through each phase of the project planning and evaluation process (modules 3-5). In addition, practical tips for trainers are provided. These tips are presented chronologically, as the trainer guides the participants through the various steps described in modules 3, 4 and 5. Time management and general facilitation tips are provided at the beginning of the guide. These tips are only suggestions and should NOT, in any circumstances, limit the flexibility and creativity of trainers in reaching the course objectives.

Train-the-trainer manual

The content of the manual carefully follows the presentations covered during the train-the-trainer course. Starting with the introduction and overview of the train-the-trainer course, it then provides some practical tips to strengthen presentation skills and training skills and prepare for and organize a coming skill-building course. All slides are provided and each presentation is preceded by the related text.

This manual is intended to be used:

- › during the train-the-trainer course to support potential trainers in following the presentations and taking notes and as a reference during the training sessions
- › for the preparation of a coming skill-building course
- › during the skill-building course, to give the trainers support in facilitating the course.

CD-ROM for trainers

A CD-ROM has been developed to support trainers and potential trainers:

- › during the train-the-trainer course
- › in preparing, organizing and running a skill-building course
- › in introducing the course in an institution.

TERMINOLOGY

The training programme in *Effective project planning and evaluation in biomedical research* involves two levels of training and provides five training support handbooks and two CD-ROMs. In order to avoid confusion about the terms used, the following terminology has been adopted and should be used in a consistent manner.

Two types of course:

- › skill-building course
- › train-the-trainer course.

Five training handbooks:

- training manual for participants
- step-by-step guide for participants
- training manual for trainers
- step-by-step guide for trainers
- train-the-trainer manual.

Two CD-ROMs:

- CD-ROM for participants
- CD-ROM for trainers.

COURSE ASSESSMENT***Train-the-trainer course***

As with the skill-building course, the train-the-trainer course assessment is useful for improving the training and conducting an initial evaluation of the course success. At the end of the train-the-trainer course, potential trainers and trainers discuss the course, what they have learned and how it can be applied. Then they all complete an evaluation questionnaire.

Train-the-trainer course

Introduction and overview of the train-the-trainer (TTT) course

*Introduction and overview of the train-the-trainer course*

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Introduction and overview of the train-the-trainer course

- Background
- Goal and objectives
- Participants
- Learning process
- Training content
- Training materials
- Terminology
- Course assessment

*Introduction and overview of the train-the-trainer course*

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Background

- Rationale
- Skill-building course
- A sustainable training programme



Introduction and overview of the train-the-trainer course

3

Rationale

- The need for capacity development for *Effective project planning and evaluation in biomedical research* has been recognized by biomedical researchers and funding agencies
- A skill-building course has been developed by TDR



Introduction and overview of the train-the-trainer course

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Skill-building course

What are the goal and objectives of the skill-building course?

To strengthen abilities of biomedical researchers in developing countries to:

- organize and manage projects better for successful implementation and collaboration
- be more competitive internationally with grant proposals

by providing the necessary project planning and evaluation tools



Introduction and overview of the train-the-trainer course

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Skill-building course

• What is the focus of the skill-building course?

- Skill development is a major component of the training
- Approximately 80% of the time is spent on case studies and experiential learning



Introduction and overview of the train-the-trainer course

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Skill-building course

What is the training methodology?

- Learning by doing and learning by sharing, discussing & reflecting
- Participants apply the planning and evaluation process step-by-step to their own project during the case studies



Introduction and overview of the train-the-trainer course

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Skill-building course

What is the immediate outcome?

- The participant's project is analysed and clear strategic outputs are defined
- Realistic draft project development plan (Gantt chart & PERT chart) is established, including activities, milestones, timelines and resources
- The need and the process for constant monitoring and evaluation during the conduct of the project is understood
- A draft communication and team work strategy is established



Introduction and overview of the train-the-trainer course

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Skill-building course

What is expected to change for the researchers who undertake the training?

- Awareness of key issues in project management and the need for team work
- Improved ability to manage and evaluate research projects and communicate with the project team
- Greater confidence



Introduction and overview of the train-the-trainer course

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Skill-building course

What will be the impact of this training on individuals, groups and organizations?

- Greater success in grant applications
- Improved project management and effective implementation of research projects
- Increased collaboration
- More effective collaborative research
- Increased number of publications in peer journals



Introduction and overview of the train-the-trainer course

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Skill-building course

- **Who are the target participants?**
 - Biomedical researchers and other health researchers from developing countries
- **How many participants will be trained?**
 - Ideally 12 researchers
 - Participants work in four groups
 - Three participants per group working on one project for adequate interaction



Introduction and overview of the train-the-trainer course

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A sustainable training programme

TRAINERS

To ensure that competent trainers are available in different countries and regions to facilitate the skill-building courses, a **train-the-trainer course** has been developed



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Goal

To strengthen the skills of selected individuals in academic and research institutions in developing countries to enable them to train researchers to plan, implement, monitor and evaluate biomedical research projects effectively



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Objectives

- To ensure that the process of project planning and evaluation has been assimilated and the related skills have been strengthened
- To enhance abilities and confidence to transfer these skills to researchers
- To strengthen presentation skills
- To strengthen training skills
- To strengthen skills needed to organize a course



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Participants

- Individuals selected from the skill-building course on *Effective project planning and evaluation in biomedical research*
- Optimal number of participants in the train-the-trainer course is six, in order to allow sufficient time for practice



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Participant selection criteria: “musts”

- Attendance at the skill-building course
- Application of the methodology to their daily work and developed skills in project planning and evaluation
- Basic computer skills (Microsoft Project & PowerPoint)
- Interpersonal skills
- Proficiency in the language of the course and training materials
- Interest in transferring these skills to researchers
- Availability to run at least one skill-building course per year (2 weeks/year)



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Participant selection criteria: “added advantages”

- Demonstrated receptiveness to the project planning and evaluation concept and methodology
- Teaching and research experience
- Institutional support (time and interest in training)



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Learning process

1. First step takes place during the skill-building course and after course when participants apply what they have learnt on their projects
2. The second step happens at the train-the-trainer course
3. Followed by practice sessions at home base
4. First skill-building course taught with support from a skilled trainer
5. Experience will lead to confidence to run skill-building courses



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Training content

- ***“Presentation skills”***
 - Practical tips for giving a presentation
- ***“Going through the training materials”***
 - The three training handbooks and the CD-ROM for trainers are presented and reviewed
- ***“Training skills”***
 - Theory and practical tips on facilitating courses



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Training content - *cont'd*

- ***“Practice”***

Each future trainer has the opportunity to:

 - Present one module of the skill-building course
 - Go through the Microsoft Project and PowerPoint software demonstrations
 - Facilitate presentations and discussions
 - Reflect and provide comments on real examples of project documentation developed during previous courses



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Training content - *cont'd*

- ***“Prepare yourself for a coming skill-building course”***
 - Practical tips
- ***“Organizing a skill-building course”***
 - Checklist for organizing a skill-building course



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

AGENDA

	Day 1	Day 2	Day 3	Day 4
Am	Welcome	"Training skills"	Practice "Module presentation, facilitation & software demonstration"	Practice "Module presentation, facilitation & software demonstration"
	Introduction & overview of the TTT course	"Going through the step-by-step guide"		
	Presentation of the training materials	Practice "Module presentation, facilitation & software demonstration"		
	"Presentation skills"			
Pm	"Going through the training materials"	Practice "Module presentation, facilitation & software demonstration"	Practice "Module presentation, facilitation & software demonstration"	"Prepare yourself for a coming course"
				"Organizing a course"
				Course assessment & next steps
				Close



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Training materials

5 handbooks:

- *Training manual for participants*
- *Step-by-step guide for participants*
- *Training manual for trainers*
- *Step-by-step guide for trainers*
- *Train-the-trainer manual*

2 CD-ROMs:

- *CD-ROM for participants*
- *CD-ROM for trainers*



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Terminology

- 2 levels of training:
 - Skill-building course
 - Train-the-trainer (TTT) course
- Training materials: 5 handbooks and 2 CD-ROMs
 - *Training manual for participants*
 - *Step-by-step guide for participants*
 - *CD-ROM for participants*
 - *Training manual for trainers*
 - *Step-by-step guide for trainers*
 - *Train-the-trainer manual*
 - *CD-ROM for trainers*



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Course assessment

- At the end of the TTT course
- By participants/potential trainers (questionnaire)
- By trainers (questionnaire)



Introduction and overview of the train-the-trainer course

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Train-the-trainer course

Conclusion

- At the end of the TTT course participants should be familiar with the training material
- They should also start feeling confident with transferring project planning and evaluation skills to other researchers
- However, further preparation and practice before running a skill-building course are essential for success



Introduction and overview of the train-the-trainer course

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Presentation skills

*“Presentation is not just what you say
It’s what you radiate”*

Arnold Sanow

KEY ELEMENTS IN COMMUNICATION

Good communication skills are essential for effective training and facilitation.¹ There are three key elements to communication. The *vocal* element focuses on how we sound and commands 38% of the audience’s attention. The *visual* element relates to how we look and forms the largest part, attracting 55% of the audience’s attention. The *verbal* element focuses on what we say and occupies only 7% of the audience’s attention.

The vocal element

The vocal element consists of how we sound when we speak. Vocal elements include:

- volume
- change in loudness
- pace and rhythm
- emphasis
- pauses
- loosening up/warming up
- clarity of speech
- breath control.

¹ Mehrabian A. *Silent messages: implicit communication of emotions and attitudes*, 2nd ed., Wadsworth Pub Co, 1980.

The visual element

The visual element consists of how we appear nonverbally to others. Visual elements include:

- posture
- movement
- eye contact
- hand gestures
- facial expression
- match between verbal and visual element.

The verbal element

The verbal element consists of what we say, i.e. the content of our speech:

- choice of words and phrases
- amount of information presented
- depth of subject matter covered
- highlighting of key messages.

PRATICAL PRESENTATION TIPS

How do you sound?

- Make sure you speak loud enough for the audience to hear you.
- In order to capture the audience's attention, it is good to vary the volume, pitch and speed of your speech.
- The rhythm is also very important and adds energy to your speech pattern, just the way you speak in normal conversation.
- Pauses are good to make your speech “breathe” and to add emphasis to a key point in your presentation.
- Speak with enthusiasm!

How do you look?

Your body language needs to be consistent with your words. If it is not, your message may be unclear and people may miss, or not believe, what you say.

- **Facial expression** – a simple smile provides a sense of warmth and openness.
- **Open posture** – by not crossing your legs or arms, you will appear to be open-minded, less defensive, less arrogant and more approachable.
- **Leaning forward** when communicating indicates interest and attentiveness.
- The **distance** between the presenter and participants is important. Too great a distance creates coldness, while being too close can create a sense of discomfort.

- › **Eye contact** is one of the most important ways to establish trust and rapport. However, the presenter must be aware of cultural norms, as some cultures may take a different view.
- › **Gestures** include hand, arm and head movements. They can enhance your presentation or detract from it. Gestures help you to emphasize important points during your presentation. Avoid putting your hands in your pockets, clasping your hands into a folded position, as if praying, or fiddling with things, e.g. clicking a pen. And remember, the only thing worse than using no gestures is using too many.
- › **Nodding** the head shows attentiveness and enthusiasm and validates the speaker's remarks.

What do you say and how do you say it?

Be natural and speak naturally

- › Be natural. Use words you are used to. Do not use a new and more complicated vocabulary just because you are giving a presentation.
- › Use simple and direct language. Use single-syllable words instead of three-syllable words, one word instead of three. Do not use terms your audience may not be familiar with, or be sure to explain them.
- › Eliminate weak words or phrases. Avoid "perhaps", "kind of" and "sort of".
- › Replace non-words ("um"/"ah") with pauses. The best way to eliminate filler words and actions is to substitute one behaviour for another. So at points of transition, or whenever you feel the need to inject filler words, simply PAUSE. The pause that seems so long to you is actually a welcome respite for your audience.
- › Your nervousness will dissipate if you focus your attention away from your anxieties and concentrate on the message you want to deliver, rather than on yourself.

Deliver your message clearly

- › Mention the purpose of your presentation and how it relates to the audience.
- › Be credible, convincing and clear.
- › *Repeat, recap, review*: repeat, during your presentation, the message you would like to deliver at least three times in order to ensure that it has been received: you first expose the message during the introduction and outline of your presentation, then you develop it during the presentation and remind participants of it in the conclusion:
 - say what you are going to say
 - say it
 - say what you have just said.
- › Emphasize the beginning and the ending. People tend to remember beginnings and endings and lose what is in the middle.

- Be focused on the message you want to deliver.
- Be short, sharp, to the point. Do not wander from the point, as it may dilute the message.
- Do not hesitate to repeat key messages to ensure they are assimilated.
- Use metaphors and anecdotes, they give a different perspective and are usually remembered.

Are you ready for the presentation ?

*“Proper preparation prevents poor performance
of the person putting on the presentation”*

Lenny Laskowski

➤ Know the room

Become familiar with the place or room in which you will speak. Arrive at the venue with enough time to rearrange the setting, if necessary. A “U-shaped” distribution is ideal for face-to-face contact and facilitates discussion. Remove unnecessary fixtures (table, etc.) and check all equipment and materials. When presenting, stand next to the screen to explain a visual and move to the centre of the stage when you want to emphasize a point.

See more in the “Prepare yourself for a coming skill-building course” section of this manual

➤ Know the audience

If possible, greet some of the participants as they arrive, chat with them and try to get to know their names. Before the skill-building course you may want to study the list of participants, in order to become familiar with their names, expertise and institutions. So, as participants arrive, you will quickly identify each participant/group.

➤ Know your material

If you are not familiar with your subject matter or are uncomfortable with it, your nervousness will increase. Practise your speech or presentation and revise it until you can present it with ease.

Rehearsal is key for the preparation of the skill-building course. Prepare each module presentation until you feel confident with its content (use trainer's notes from the training manual to assist you), the flow and transition of slides and the duration of the presentation.

› **Learn how to relax**

You can ease tension by doing exercises. Sit comfortably with your back straight. Breathe in slowly, hold your breath for 4-5 seconds, and then slowly exhale. To relax your facial muscles, open your mouth and eyes wide, then close them tightly.

› **Visualize yourself speaking**

When you visualize yourself as successful, you will be successful.

› **Realize that people want you to succeed**

All audiences want speakers to be interesting, stimulating, informative and entertaining.

› **Do not apologize for being nervous**

Most of the time your nervousness does not show at all.

› **Practice and experience**

Most beginner speakers find their anxieties decrease after each talk they give.

In the beginning, it is expected that two co-trainers will run a skill-building course, until the trainer feels confident to run a course alone.

PREPARING THE PRESENTATION SLIDES

The presentation slides for the skill-building course are provided. However it is important to understand the structure of the presentation and the format chosen for the slides.

Structuring the presentation to deliver the message

› **Focusing on the message**

Structure your presentation by focusing on the message you want to deliver. Define the message, determine the key ideas to support your message and back them up with evidence. Remember that an audience can only remember 4-6 different points, so choose your key ideas carefully.

► How to structure the presentation

As mentioned in the section “Deliver your message clearly”, during the presentation you should:

- say what you are going to say
- say it
- say what you have just said.

Structure your presentations to make it easier for the audience to follow:

- prepare a first slide with the title of your presentation
- prepare a second slide with the content of your presentation, showing an overview of the different sections to be covered (*“Say what you are going to say”*)
- go through the presentation, starting with the first section of the list and developing this idea with a first set of slides – the same structure should be used for the following sections
- before starting each new section, you may need to insert a further slide of the overview, highlighting the section you are about to present
- prepare a slide to close the presentation by summarizing or restating the message (*“Say what you have just said”*) – a closing slide that relates back to your opening can also be effective – whatever you choose for your close, make sure you tell your audience what you expect them to do next.

► Formatting the slides

Choose font type, style, size and colour. Use font types that are easy to read such as Times New Roman, Arial, Verdana or Georgia. Choose a font size that is readable for your audience (at least 24 pt is advisable). Keep the formatting of your slides the same by consistently choosing the same font size, type, style, colour and bullets for the title, subheadings and text. You should only change the formatting (font type, font style, e.g. italic / bold, or font colour) to emphasize a message or idea. Overuse of these effects reduces their impact. When using *Microsoft PowerPoint*, formatting the Slide Master as a first step in preparing a presentation will help you to achieve consistency between the slides.

Font colours should contrast with the background to ensure readability. Use a light-coloured font when the background is dark, and a dark-coloured font when the background is light in colour.

► Selecting information to be inserted in the slides

Do not write too much information in your slides. List the topics to be presented on each slide (preferably organizing them by bullets), read them for the audience to follow and develop the items by explaining the idea to the audience. You should allow an average of one minute’s presentation per slide.

► Adding special effects to your presentation

When giving a slide show, you can use special visual and animation effects. However, use these resources only to emphasize the main points. Overuse of effects will draw the audience’s attention to the effect itself and distract it from the message of the presentation.

OPERATING TIPS FOR VISUAL AIDS

There are numerous visual aids to choose from. Here we focus on the three visual aids that are most likely to be used by the trainer in the skill-building course: data projectors, overhead projectors and flipcharts.

All presentations of the skill-building course are already prepared as *Microsoft PowerPoint* presentations (introduction and overview, modules 1 to 5 and course assessment). Therefore the data projector will be the first-choice equipment. However, if the venue where the course will be conducted does not have a data projector available, you can print the slides onto transparencies and use the overhead projector to present them. In this case, the groups will also have to use the overhead projector or flipchart to present their case studies.

When organizing the course, always check well in advance whether the venue / organizer has a data projector available.

Data projectors

A data projector is a device that takes a signal from a computer, television or video source and produces a large image using projected light. These projectors are increasingly becoming the visual aid of choice, but are not as readily available as overhead projectors. A major drawback is that the operator needs to have some degree of technical expertise or to have technical assistance on hand. Listed below are operating tips for use of data projectors.

› Projectors

- Use data projectors with great care. Data projectors and replacement lamps are expensive.
- Do not touch hot surfaces on the data projector or block the cooling fan.
- Do not block the light beam close to the data projector as it is very hot. It melts plastic and may start a fire.
- Keep any flammable objects clear of the data projector.
- Have an extra lamp on hand. Be aware that lamps typically lose brightness with age.
- Carry an extension cord and a multi-plug power board with the projector.
- Label all cables clearly so that it is easy to set up the data projector.

› Screens and image projection

- Consider using a light-coloured painted area on a wall if a screen is not available.
- Check that the screen is not reflecting the light or sunshine.
- Set the projector to maximum image size.
- Move the projector until the image just fills the screen.

- Make sure the image is in focus.
- Consider a *health and safety approved* laser pointer for ease of presentation.

Overhead projectors

Overhead projectors are also readily available at most course venues. They are useful for presenting multicoloured diagrams and also allow for additional information to be presented as overlays. The transparencies are easily transported and can be reused.

When using overhead projectors, it is advisable to:

- › set up the projector ahead of time and ensure that the information displayed is clearly visible
- › have an extra lamp on hand
- › set up the projector such that you are able to face the group while presenting and ensure that you are not obstructing the screen
- › have a pointer handy to point out specific items of interest.

Flipcharts

Flipcharts are useful to highlight discussion points, issues, next steps, etc. which are raised during the course. They have the advantage of being readily available in most organizations and course venues.

When using flipcharts it is advisable to:

- › avoid cluttering the charts with pictures and drawings that may distract from the wording
- › avoid writing on the flipchart with your back facing the group; practise standing to one side of the chart with part of your body behind the chart
- › have a chair placed on your writing side of the chart, so that you can sit down when it is appropriate, e.g. during discussion periods
- › most flipchart paper is fairly thin; be sure to use double sheets when participants are writing on sheets taped to the walls, so that the ink does not mark the walls
- › allow one flipchart pad for every six people if you are working in small groups
- › make pencil notes to yourself if necessary, between the lines of the larger marker words – you will be able to read these notes, but they will not be visible to others
- › make sure you choose an appropriate writing size so that text and drawing can be read by all participants
- › you may use prestik to tape sheets on the wall
- › number the pages.

Security tips

- › As data projectors are expensive, they are a target for theft. It is therefore unwise to have them visible through windows after hours.
- › All portable units should be placed in a secure store at the end of every day.
- › Any projectors permanently mounted below the ceiling should have a security attachment or a locked steel bracket to prevent unauthorized removal.

Train-the-trainer course

Presentation skills



Presentation skills

1



*"Presentation is not just what
you say...
It's what you radiate"*

Arnold Sanow



Presentation skills

2

Presentation skills

- Key elements in communication
- Practical presentation tips
- Preparing the presentation slides
- Operating tips for visual aids



Presentation skills

3

Key elements in communication



Vocal element: focuses on how we sound when we speak and commands **38%** of audience attention



Visual element: relates to how we appear to the group and commands **55%** of audience attention



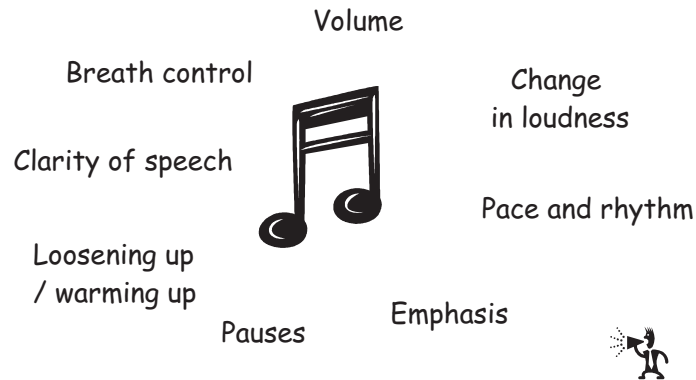
Verbal element: focuses on what we say in addressing a group and commands only **7%** of audience attention



Presentation skills

4

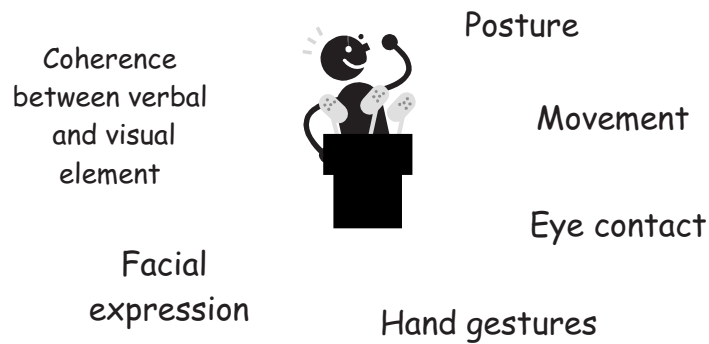
Vocal element



Presentation skills

5

Visual element



Presentation skills

6

Verbal element

Highlighting
of key messages

Choice of words
and phrases

What
you say

Depth of subject
matter covered

Amount
of information
presented

 *Presentation skills* 7

Key elements in communication: Take-home message

Sound and appearance contributes
up to 93% of audience attention



 *Presentation skills* 8

Practical presentation tips

- How do you sound?
- How do you look?
- What do you say and how do you say it?
- Are you ready for the presentation?



Presentation skills

9

How do you sound?

- Speak loud enough for the audience to hear you
- Vary volume, pitch and speed of your speech
- Rhythm adds energy to your speech pattern
- Pauses are good to make your speech “breathe”, to add emphasis to a key point and to give your audience time to assimilate what you have said
- Speak with enthusiasm!



Presentation skills

10

How do you look?

- **Facial expression:** a smile provides a sense of warmth and openness
- **Open posture:** do not cross your legs or arms
- **Leaning forward** indicates interest and attentiveness
- **Distance:** not too far and not too close



Presentation skills

11

How do you look? (cont'd)

- **Eye contact:** establishes trust and rapport, but be aware of cultural norms
- **Gestures:** hand, arm and head movements can help to emphasize important points, but avoid fiddling with things or putting your hands in your pockets
- **Nodding the head:** shows attentiveness and enthusiasm and validates the speaker's remarks



Presentation skills

12

What do you say and how do you say it?

- Be natural and speak naturally
 - Be natural
 - Use simple and direct language
 - Eliminate weak words or phrases
 - Replace non-words ("um"/"ah") with pauses
 - Your nervousness will dissipate if you focus your attention away from your anxieties and concentrate on the message

Euh...
so..., hum..



Presentation skills

13

What do you say and how do you say it? (cont'd)

- Deliver your message *clearly*
 - Mention the purpose of your presentation and how it relates to the audience
 - Be credible, convincing, clear
 - Repeat, recap, review: Say what you are going to say / say it / say what you have just said.
 - Emphasize the beginning and the ending
 - Be focused on the message you want to deliver
 - Go through each point of the slides
 - Use metaphors and anecdotes to illustrate your point



Presentation skills

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Are you ready for the presentation?

- ✓ Know the room
- ✓ Know the audience
- ✓ Know your material – rehearse



Presentation skills

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Are you ready for the presentation? (cont'd)

- ✓ Learn how to relax
- ✓ Visualize yourself speaking
- ✓ Realize that people want you to succeed
- ✓ Do not apologize for being nervous
- ✓ Practice and experience



Presentation skills

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Preparing the presentation slides

- Structuring the presentation to deliver the message
- Formatting the slides



Presentation skills

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Structuring the presentation

Focus on the message to deliver

- Define the message and the key ideas to support it
- Back them up with evidence



Presentation skills

18

Structuring the presentation – *cont'd*

Structure the presentation clearly

- ***“Say what you are going to say”***: slide with presentation outline, main ideas to be developed
- ***“Say it”***: each section of the outline is developed in a logical way, supporting the message
- ***“Say what you have just said”***: slide summarizing or restating the message



Presentation skills

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Formatting the slides

- **Choosing font type, style, size and colour**
 - Ensure readability and consistency between slides
- **Background and font colours**
 - Contrast is essential
- **Selecting information to be inserted**
 - Do not write everything!
 - List the topics to be covered by each slide and explain them
- **Allow an average of 1 minute of presentation per slide**
- **Adding special effects**
 - Use them only to emphasize a point, be careful to not distract the audience’s attention



Presentation skills

20

Operating tips for visual aids

- Data projectors
- Overhead projectors
- Flipcharts



Presentation skills

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Data projectors

- All presentations of the skill-building course are prepared as presentation files
- The data projector is the equipment of choice for the skill-building course

"When preparing for a course, always check well in advance the availability of a data projector"



Presentation skills

22

Data projectors (cont'd)

- Increasingly becoming the visual aid of choice
- Requires some degree of technical expertise or availability of a technical expert
- Expensive and therefore must be treated with care



Presentation skills

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Operating tips for data projectors

- Do not touch hot surfaces or block cooling fans
- Useful to always carry an extension cord, a multiplug board and an adaptor
- Label all cables clearly for easy setup
- Be aware that lamps lose brightness with age



Presentation skills

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Overhead projectors

- Usually readily available in most course venues
- Provide an informal atmosphere
- Overlays can be used to simplify complex information into layers



Presentation skills

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Operating tips for overhead projectors

- Set up the projector to ensure the information displayed is clearly visible
- Have an extra lamp on hand
- Set up the projector so that you are able to face the group while presenting and do not obstruct the screen
- Have a pointer handy



Presentation skills

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Flipcharts

- Very useful for noting information on logistics issues, group composition, key points raised during the discussions, issues, next steps, etc.
- Readily available in most course venues
- Low cost
- Sheets can be easily displayed on wall surfaces for continual reference



Presentation skills

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Operating tips for flipcharts

- Avoid cluttering the charts with pictures and drawings
- Stand to one side of the chart when you write to avoid facing your back to the group
- Place a chair next to the chart so that you can sit down when appropriate e.g. in discussion periods
- Make pencil notes to yourself between the lines of the larger marker words
- Plan for one flipchart for every 6 people if you are working in small groups



Presentation skills

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Operating tips for flipcharts (*cont'd*)

- Writing size
- Prestik to fix on wall
- Number pages



Presentation skills

29

Summary

- Appearances count
- Visual aids are very important
- Practice and proper preparation are essential



Presentation skills

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Training skills

This section outlines the main responsibilities that a trainer has while running a skill-building course and highlights the key training skills that help her/him to fulfil these responsibilities. The facilitation role of the trainer and the importance of group management and communication in performing the role of trainer are presented and some practical tips are provided. The section also covers a few aspects of group behaviour, such as group dynamics and stages of group development.

THE ROLE OF THE TRAINER

Trainer's responsibilities during the skill-building course

During the skill-building course, the trainer has the following key responsibilities:

- To keep the course goal-directed at all times:
 - provide participants with new tools and knowledge to help them to organize and manage their research better
 - ensure that participants understand the concepts
 - help them to feel confident and apply the new tools to their own project during the four days of the course and at home afterwards.
- To manage the group:
 - monitor the group energy and ensure involvement of all participants at all times as well as a healthy, participative environment
 - recognize that individuals participate in different ways and yet ensure that group activities provide meaningful roles for all participants
 - pace the activities to suit the participants' responsiveness – keep things moving, but be sensitive to the effects of fatigue on the training process
 - manage conflicts.

➤ To establish ground rules for the group in order to create a conducive atmosphere:

- trust for each other
- openness in attitudes and information
- understanding and acceptance of others
- confidentiality
- addressing people by their names
- respecting each other's time and space.

Key training skills required

Good facilitation, group management and communication skills help the trainer to provide participants with the best possible knowledge and tools and help them to use them. Figure 1 shows how "facilitation," "group management" and "communication" are linked activities and an integral part of training.



Figure 1 Training aspects

In this manual, the person who runs the skill-building course is always referred to as the "trainer". She/he needs to have not only facilitation skills, but also communication and group management skills. The trainer delivers the content of the course.

FACILITATING

Teaching or facilitating?

In Webster's Dictionary, "to facilitate" is defined as "to make easier or less difficult; help forward". The word "facilitation" in the context of group meetings, courses or workshops means that a neutral person with no decision-making authority helps the group to be more efficient and effective. Courses may involve diverse participants coming from different backgrounds. However, they all have a

common objective. A facilitator helps participants to interact with each other, gain new information and build upon their experience. She/he guides a process which helps participants to reach their stated goals and objectives within the time allotted. The facilitator's key role is to help the group experience and learn together.

In the course for *Effective project planning and evaluation in biomedical research*, the trainer needs to be a skilled facilitator to help participants to understand the concept and process of project planning and evaluation and to apply it to their own project. Facilitation skills are key to guiding the participants through the process of experiential learning.

Table 2 lists the differences in the roles played by a traditional teacher and a facilitator.

Table 2 Comparison of roles played by teachers and facilitators²

Traditional teachers	Facilitators
1. Main focus is on presenting content.	1. Main focus is on making content meaningful to learners.
2. Basic approach is: "Here is what you need to learn and here is how we are going to do this"	2. Basic approach is: "How can I help you learn what you want to learn?"
3. Usually help learners deal with content in one way.	3. Usually help learners deal with content using a wide variety of approaches.
4. May begin and end with a lecture approach.	4. Use a lecture to get at something else, e.g. application of content to personal experience.
5. Rarely ask questions about learners.	5. Usually ask many questions about the learners.
6. Encourage learners to see a particular view of reality within the subject matter, e.g. "These project objectives are not acceptable because they are not specific"	6. Encourage learners to develop their own views of reality by using the subject-matter, e.g. "Do these objectives reflect all what you want to achieve? Do you have a way to measure that you have achieved them?"
7. See themselves as completely responsible for what goes on in the learning situation.	7. See themselves as sharing the responsibility for the learning situation with the learners.
8. Usually do not involve the learners in planning, presenting and evaluating the workshop or course.	8. Involve the learners in participating in every aspect of the workshop or course.

² Adapted from: Canadian Aquafitness Leaders Alliance. *Training for trainers*. Cape Town, 2000, unpublished.

A good facilitator:

- › keeps the group focused on task and process
- › remains as objective as possible
- › is an informed guide, helping the group to accomplish its objectives
- › listens more than talks
- › adopts various learning styles
- › encourages everyone to participate, while remembering that individuals participate in different ways; some may talk only in small groups, but still be participating, while others may talk constantly but be contributing little
- › protects members of the group from attack by others
- › is sensitive to gender and cultural issues
- › energizes a group or slows it down, as needed
- › recaps occasionally on what has happened in the course and helps group to make connections between the sessions.

Level of intervention by the facilitator

As mentioned above, facilitation may be described as the process of making something easier. The role of the facilitator can vary from doing nothing to actively directing the activities. The spectrum of

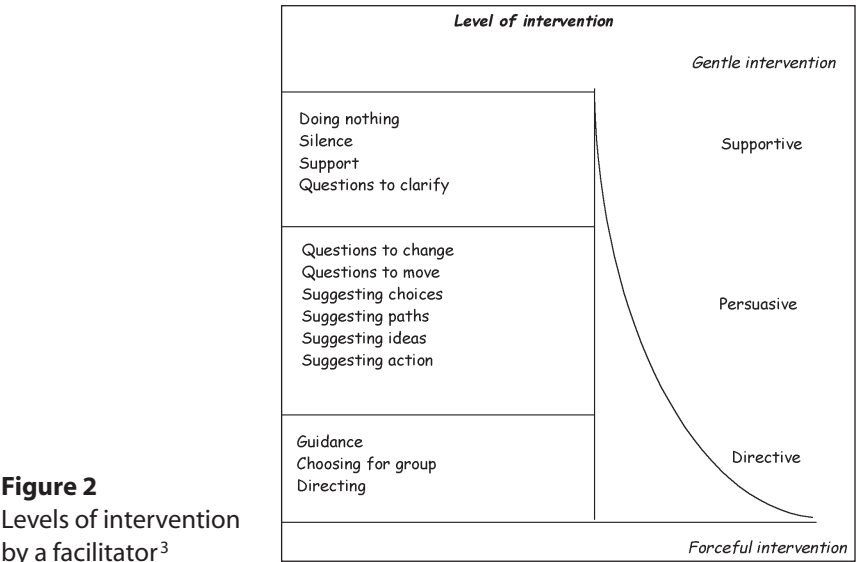


Figure 2
Levels of intervention
by a facilitator³

³ Bentley T. *Facilitation*, 2nd ed., Gloucestershire, The space between publishing, 2000.

options for facilitation is shown in Figure 2. The approach used by the trainer varies during the different stages and modules of a meeting or course.

Benefits of strong facilitation skills

- increased ability to manage diverse groups and ensure participants' involvement
- improved skills for managing conflict
- better utilization of local knowledge, resources and capacities
- enhanced collaboration, coordination and understanding among participants
- more effective courses.

MANAGING GROUPS

Monitoring the group

Group dynamics

During the skill-building course, participants learn both from theory and from applying theory in practice by working with their own projects. Participants come with their own experience, awareness and communication style. The trainer plays an important role in bringing about congruence (the state of being in agreement, in harmony) among group members and tapping into the group energy (see Figure 3).

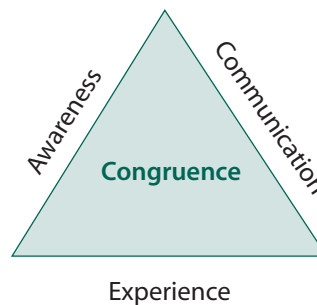


Figure 3 Congruence in a group³

A better understanding of group behaviour enables the trainer to identify the phases of group development and to respond to group needs, maximizing the participant's activities and contributions.

³ Bentley T. *Facilitation*, 2nd ed., Gloucestershire, The space between publishing, 2000.

Stages of group development

Every group goes through five predictable stages of growth and development: **forming, storming, norming, performing** and **adjourning**.⁴

Forming

- › At the forming stage, group members wonder why they are there and whether they will be accepted and included in the group's work.
- › There is little commitment to other individuals in the group, or to the group itself. The only real connection comes from the "here we all are" factor.
- › Team-building is important at this stage. Do not assume that people know each other, or are comfortable with each other. There is a high degree of dependence on the trainer for guidance and direction.

- › At this stage, it is important to:
 - develop trust
 - clarify expectations and provide clear and consistent instructions
 - respond quickly and clearly to questions
 - define and understand the group's purpose
 - get to know each other.

Storming

- › During the storming stage, the group members compete for control. Some are vocal, others go underground. Individuals want to feel that they can be heard, and that they can have an influence on the group and its direction.
- › There is increasing clarity about what the challenges are. Participants feel some commitment to the group and now want to make an impact on the direction it will take.
- › Storming is an important phase. The energy level gets pumped up and people demonstrate their interest in what is going on.
- › During this stage, the group needs to be focused on its objectives to avoid becoming distracted by relationships and emotional issues. Compromises may be required to enable progress.

- › At this stage, it is important to:
 - "normalize" the situation
 - support and encourage group and individual leadership
 - provide encouragement, praise, reassurance
 - monitor progress, mediate if necessary.

⁴ Tuckman, Bruce W. *Development sequence in small groups*. Psychological Bulletin, 1965, 63(6), 384-399.

During this phase, the trainer may need to be very active. However, trainers who are too rigid in their control of the group often find that some of the best leaders leave because of their frustration with the trainer's leadership style.

Norming

- The norming stage brings a new awareness of how everyone can fit into the group. Objectives become clearer, and patterns of decision-making begin to become established.
- The group begins to sense its own power, and many interpersonal battles are settled in favour of the overall objectives of the group.
- Close attention is paid to how things are done.
- Participants are increasingly clear about who can do what in moving problems through the group.

- At this stage it is important to:
 - recognize individual and group efforts
 - provide learning opportunities and feedback
 - monitor energy within the group.

Performing

- The performing stage is where most groups try to get without realizing the other stages they must deal with successfully first.
- Performing means that conflict is well handled: there are strong disagreements, but they revolve around "what" and "how" rather than "who". Performing means that participants feel good about their involvement. It also means that objectives and needs are met and people assume responsibility equitably.

- At this stage it is important to:
 - celebrate the progress and achievements of the group
 - "guide from the side", making minimal interventions
 - encourage group decision-making and problem-solving.

Adjourning

- Adjourning is the break-up of the group, hopefully when the task has been completed successfully and its purpose fulfilled. Everyone can move on to new things, feeling good about what has been achieved.
- Sadness may be felt if the group experience is ending completely.
- Discussion of how the group will stay connected is important.

- At this stage it is important to:
 - acknowledge changes
 - provide the opportunity for collective group evaluations
 - provide the opportunity for goodbyes and acknowledgements.

Some groups get stuck at one stage and never seem to progress. Others move quickly to the performing stage, solving problems effectively and handling individuals' needs well. The basic stages of group development are related to the size of the group, the amount of time they have been together and the changing psychological mindset within the group. Look for signs that will tell you where the group is. When the group is ready, it will move on constructively to the next phase. While the obvious aim is to get to the performing stage as soon as possible, it is fruitless to attempt to skip the earlier stages.

Group energy

Group energy field

When a group forms, the individual members bring their physical, intellectual, emotional and spiritual energy into the group. The resultant intermingling of individual energies forms the unique group energy. The group energy flows in two directions. The inward-flowing energy is contracting and low in intensity, while the outward-flowing energy is expansive and high in intensity. At any one time, the group energy lies somewhere between the two extremes, and the energy level for each of the four elements may be at a different level (see Figure 4). A skilled trainer is able to assess and tap into the group energy field to maximize group participation and interactions.

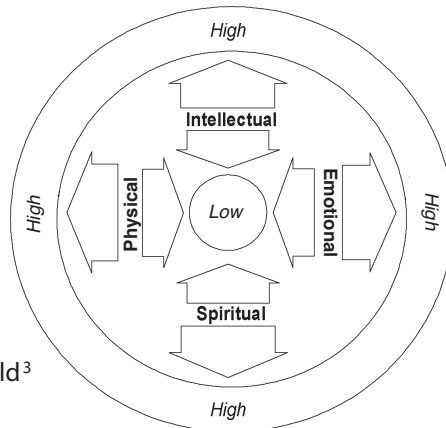


Figure 4 The group energy field³

³ Adapted from Bentley T. *Facilitation*, 2nd ed., Gloucestershire, The space between publishing, 2000.

Group physical energy

When the physical energy is high, individuals are physically more active, with numerous hand and body movements, impatient, eager to do things and generally light-hearted. If this energy is not well managed and suppressed, it can lead to disruptive behaviour. When the physical energy is low, people physically withdraw, for example by dozing off, sitting in their seats half-asleep or slouching. Others in the group may imitate them. Individuals who are still highly energized may find this extremely frustrating.

Group intellectual energy

Group intellectual energy is noticeable by the extent to which participants engage in questioning, searching for information and problem-solving. This energy level is low when the group is more reflective and thinking quietly. When intellectual energy is high, participants engage in more talking than thinking. The trainer needs to guide this process to ensure that subsidiary conversations do not disrupt the group process.

When the physical and intellectual group energies are both high, the group often feels exhausted at the end of the session or activity. A period of high intellectual energy is often followed by one of low intellectual energy.

During the low intellectual energy period, it is best not to introduce new and difficult concepts, but allow for quiet reflection instead.

Group emotional energy

High emotional energy arises when something is said or happens which affects one or more members of the group emotionally. Emotions are expressed through physical reactions such as laughter, shouting, screaming, crying or rage. This can impact negatively on the group as a whole, and must be addressed or managed to prevent disruption to the group process. Low emotional energy tends to coincide with high intellectual energy, when participants focus on the activity on hand and resist the urge to express emotions.

The trainer must be wary of eliciting emotions that would not otherwise appear on their own, as this can lead to further disruption to the functioning of the group.

Group spiritual energy

Group spiritual energy is a combination of physical, intellectual and emotional energy and is difficult to assess. High spiritual energy is characterized by an openness, a strong sense of belonging and unrestrained contact. When the spiritual energy is low, participants limit themselves to intellectual discussions only and there is very little opportunity for contact or openness.

Tapping into the group energy

The trainer needs to be able to assess and tap into the group energy to maximize group participation and interactions. When group energy is low, it is a good time to take a break or end the session.

Managing conflicts

The ability to manage conflict is also an essential skill for a trainer. There are three main types of attitude that participants may adopt. An understanding of these helps the trainer to adapt and react more appropriately.

Aggressive attitude

Aggressive people are domineering, forceful, bold, mean, uncaring, forward, pushy and belligerent. They make things happen, regardless of how others feel or think. A person adopting an aggressive style does the following:

- › becomes defensive
- › discounts the feelings of others; assumes an “I am right” position
- › wants to “win,” even at the expense of the relationship
- › tries to manipulate others
- › uses statements such as “The meeting is at 2 p.m.; I do not care what you have on your schedule; just be here.”

Nonassertive attitude

Nonassertive people tend to be soft-hearted, modest, hesitant, insecure, withdrawn; they wait for things to happen; they lose self-respect because things never quite happen as they intend. A nonassertive person does the following:

- › gives in to others’ expectations and viewpoints to avoid conflict
- › assumes a “You are right” position
- › does not see her/his own personal feelings as important
- › will end up in a “lose” situation
- › is easily manipulated by an aggressive person
- › does not openly show anger
- › uses statements such as “How can I possibly know the answer to that?”

Assertive attitude

Assertive people are direct, firm, honest, tactful, confident and positive. They make things happen, maintain their self-respect and gain respect from others. An assertive person does the following:

- › brings conflict into the open where the communication process can continue
- › is interested in a “win-win” situation
- › understands that it is acceptable to get angry, but in a way that expresses feelings

- › recognizes her/his personal rights while respecting the rights of others
- › uses statements such as “This is how I see it;” “This is how I feel” or “This is what I think.”

In a group, it is common to observe the same person assuming different types and levels of attitude in the different stages of group development.

Conflicts

If conflict arises during the course, the trainer should encourage the participants to take the following approaches:

- › avoid personal attacks and stick to the issues
- › emphasize points of agreement as a foundation for discussion of points of argument
- › avoid a “win-lose” position
- › see positive aspects of both sides of the conflict
- › be positive and remain flexible.

COMMUNICATING

Main communication elements

The main communication elements are described in the “Presentation skills” section above:

- › vocal element
- › visual element
- › verbal element.

These elements play a major role, not only when giving presentations but also in all other aspects of communication.

Main communication styles

The section on conflict management presents the three main types of attitude that individuals may adopt, namely nonassertive, assertive and aggressive. The present section addresses the communication styles which are related to these attitudes:

- › aggressive communication style
- › nonassertive communication style
- › assertive communication style.

Table 3 lists some key aspects of the communication elements associated with each of these communication styles: the tone of voice, body posture, facial expressions and hand and arm gestures.

Table 3 Three types of communication style⁵

Communication element	Communication styles		
	Aggressive	Nonassertive	Assertive
Tone of voice	Sarcastic, arrogant, condescending	Low, timid, anxious, distressed, apologetic, unsure	Confident, assured, even, steady, relaxed, calm
Body posture	Rigid, taut, firm, edgy	Bent shoulders, wants to appear insignificant	Self-assured, leans forward, erect
Facial expression	Cold, angry, threatening, staring	Downcast head and eyes, unsure, timid	Direct, genuine, happy, smiling, serious, caring
Hand and arm gestures	Shaking fist, pointing fingers, quick, angry movements	Nervous hands, drooped shoulders, lots of nervous movement	Relaxed hand movements, informal, easygoing, spontaneous, unpretentious

Adopting an assertive communication style is most desirable for a trainer. Indeed, this style gives the image of a trainer whose aim is to help participants and to be flexible and open, while giving clear guidance. Participants therefore feel more confident, involved and responsible for the success of the course.

PRACTICAL TIPS

Be open and flexible, but firm

- › Have an “iron hand in a velvet glove”.
- › Keep in mind where you want to go (course objectives).
- › Be friendly, open, encouraging and respectful; adapt to the group and find the best way to go where you want to go.

Ensure a conducive atmosphere

Establishing an atmosphere conducive to sensitivity, participation and openness is of the utmost importance.

- › Involving all participants, establish ground rules to be followed during the course:
 - trust for one another, understanding and acceptance of others

⁵ Shelton N., Burton S. *Assertiveness skills* (Business Skills Express Series). McGraw-Hill, New York, 1993.

- openness in attitudes and information
- confidentiality
- attentive, active listening, understanding of each other
- the use of direct language, for example using statements instead of questions
- addressing people directly, using their names
- respecting the time and space that other people need to express themselves fully.
- Ensure these rules are endorsed and respected.
- Make participants feel confident, reminding them that *they* are the experts and that you are here to provide new tools and to help them apply the tools once these are meaningful to them.
- Let participants know your expectations.
- Admit your own mistakes or lack of knowledge on certain topics.
- Do not feel that you must be an expert. Ask other participants for their ideas on a question. Do not feel you should be able to answer everything – you shouldn't!
- **Keep things simple.**
- **Be brief** and to the point.
- Use as little jargon as possible.

Get the best out of participants

- Encourage dialogue through eye contact and expression (nod, smile, lean towards the speaker).
- Use affirmation and encouragement to get the best out of people.
- Praise participants when appropriate. Make sure that young researchers are not inhibited by the presence of senior researchers.
- Be alert to signs of confusion (puzzled or frustrated looks, people asking their neighbour questions, etc.).
- Ask frequently whether participants have any questions, and ask your own specific questions to check that key concepts are understood.
- When you *do* ask a question, allow group members time to think before answering. Slowly count to 10. This may seem like a long time and the silence may feel uncomfortable, but giving participants time to think is essential if you want thoughtful answers.
- You may also use the ***Socratic approach***:⁶
 - Know the answer you want
 - Open questioning
 - Paraphrase participants' answers
 - Summarize contributions
 - Add your own points.

⁶Townsend J. *The trainer's pocket book*, 8th ed., Alresford, Management Pocketbooks, 1996.

- › Respect individuality and allow participants the time and space to express themselves.
- › **Listen actively.**

Remember the key elements in communication and use them

- › Involve people whenever possible: make eye contact, have a relaxed, welcoming body posture. Create a climate where the group will be comfortable asking questions.
- › Use specific incidents, anecdotes or personal experiences to make your point. Well-chosen comparisons or examples work wonderfully.
- › Use audiovisual aids (overhead, flip chart, handout, visual model) to emphasize and reinforce key points.

Conduct a constant evaluation

- › During your presentation, check that all participants can see, hear and understand.
- › After your presentation, ask your audience for comments, questions and feedback to assess their understanding and reactions.
- › At an appropriate time following the course, ask your co-trainer for feedback on content and presentation.

Monitor the group dynamics and the group energy

- › Beware of the physical environment and how it can influence group behaviour. You may be able to rearrange furniture etc. to make the participants more comfortable.
- › At the beginning of each session, explain to the group the timeframe and tasks to be performed.
- › Take short “stretch breaks”; these are useful to prolong the attention span of participants during intensive work sessions.
- › Facilitate the development of the group.
- › Monitor the level of group energy and adapt / react to it to avoid any disruption.

Give appropriate support

- › Do not do participants' work for them. Learning is more effective and longer-lasting if individuals and small groups discover on their own (learning by doing).
- › All groups do not need the same level of support. Adapt to the needs of each in order to ensure they all follow the process.
- › Circulate, but do not become a permanent part of any one group, because you may influence it too easily.
- › Spend enough time with each group during small group work to be certain they have grasped the tasks and concepts involved.
- › If several individuals or groups are having difficulty, review those parts of the small group tasks which are causing confusion.

- › Be flexible. Keep the times of your sessions and depth and breadth of content fairly flexible. Changing something does not mean you have planned it poorly: it probably means you are listening, watching and adjusting your plans to fit the situation.
- › Adapt your training approach to the various stages of the course and to the participants' progress.

When a participant talks too long

- › Ask members for their views: how many want to stay with the issue and how many are ready to move on?
- › Ask another participant to summarize what has been covered up to now.
- › Cut across with "thanks" for input, and throw a question immediately to someone else.
- › Ask the participant to explain how the comments relate to the topic (if off-topic).
- › Give others an opportunity to have their say and return to the first participant if time permits.
- › Get confirmation of answers or views from several other participants before moving ahead.

Stop side-conversations

- › Stop talking and wait for everyone else to do the same before continuing.
- › Direct a specific question to one of the individuals engaging in a side-conversation.
- › Ask the individual(s) concerned to share their conversation so that all may benefit.

When a participant argues obstinately

- › Summarize what has been said in order to achieve a common understanding within the group.
- › Address a question to other participants to achieve clarity on the issue and then move on.

Paraphrasing and summarizing are useful tools

- › **Paraphrasing** is simply restating in your own words what another person has said. The prefix *para* means *alongside*, as in the word *parallel*. It works as a confirmation of what was said and ensures that all in the group have the same understanding. Paraphrasing might start with the following phrases:
 - You are saying...
 - In other words...
 - I gather that...
- › **Summarizing** enables the speaker to achieve the following:
 - to pull important ideas, facts or data together
 - to establish a basis for further discussion, or to make a transition
 - to review progress
 - to check for clarity or agreement
 - to emphasize the "take home" message.

Train-the-trainer course

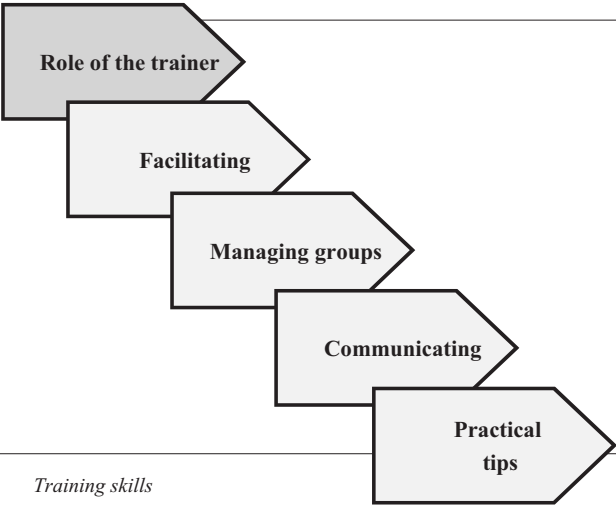
Training skills



Training skills

1

Training Skills



Training skills

2

Role of the trainer

- Trainer's responsibilities
- Key training skills required



Training skills

3

Trainer's responsibilities

- To keep the course goal-directed at all times
 - Provide new knowledge and new tools for participants to help them organize and manage their research better
 - Ensure that participants understand the concepts
 - Help them to feel confident and to be able to apply the new tools to their own project during the course and back home



Training skills

4

Trainer's responsibilities *(cont'd)*

- To manage the group:
 - Monitor the group energy and ensure involvement of all participants at all times and a healthy participative environment
 - Recognize that individuals participate in different ways and yet ensure that group activities provide meaningful roles for all participants
 - Pace the activities to suit the participants' responsiveness. Keep things moving, but be sensitive to the effects of fatigue on the training process
 - Manage conflicts



Training skills

5

Trainer's responsibilities *(cont'd)*

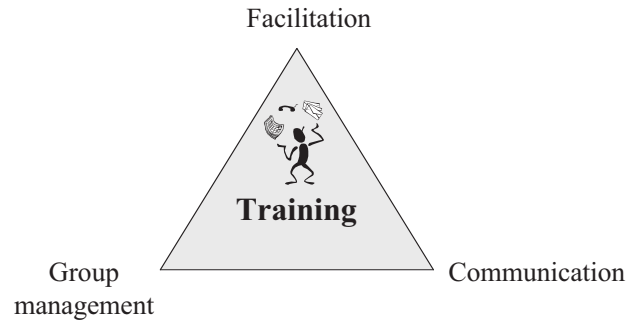
- To establish ground rules for the group
 - Trust for each other
 - Openness in attitudes and information
 - Understanding and acceptance of others
 - Confidentiality
 - Addressing people by name
 - Respecting each other's time and space



Training skills

6

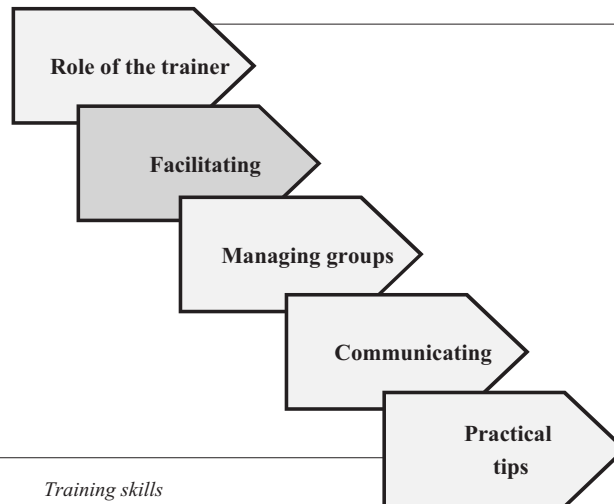
Key training skills required



Training skills

7

Training Skills



Training skills

8

Facilitating

- Teaching or facilitating?
- Level of intervention by the facilitator
- Benefits of strong facilitation skills



Training skills

9

Teaching or facilitating ?

- Facilitation may be described as the process of *making something easier* by providing participants with tools and direction



Training skills

10

Teaching or facilitating ? *(cont'd)*

- *T* - Main focus is on presenting the content
- ***F* - Main focus is on how to make the content meaningful to learners**
- *T* - Basic approach is: “Here is what you need to learn and here is how we are going to do this”
- ***F* - Basic approach is: “How can I help you learn what you want to learn?”**



Training skills

11

Teaching or facilitating ? *(cont'd)*

- *T* - Usually help learners deal with content in one way
- ***F* - Usually help learners deal with content using a wide variety of approaches**
- *T* - May begin and end with a lecture approach
- ***F* - Use a lecture to get at something else, e.g. application of content to personal experience**



Training skills

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Teaching or facilitating ? *(cont'd)*

- *T* - Rarely ask questions about the learners
- ***F* - Usually ask many questions about the learners**
- *T* - Encourage learners to see a particular view of reality within the subject-matter
- ***F* - Encourage learners to develop their own views of reality by using the subject-matter**



Training skills

13

Teaching or facilitating ? *(cont'd)*

- *T* - See themselves as being completely responsible for what goes on in the learning situation
- ***F* - See themselves as sharing the responsibility for the learning situation with the learners**
- *T* - Usually do not involve the learners in planning, presenting or evaluating the workshop or course
- ***F* - Involve the participants in every aspect of the workshop or course**



Training skills

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A good facilitator

- Keeps the group focused on task **and** process
- Remains as objective as possible
- Is an informed guide, helping the group to accomplish its objectives
- Listens more than talks
- Adopts various learning styles
- Encourages everyone to participate while remembering that individuals participate in different ways



Training skills

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A good facilitator (cont'd)

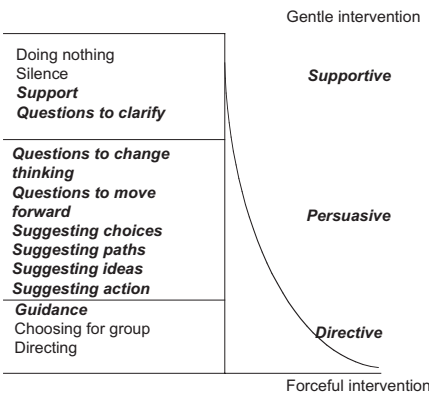
- Protects members of the group from attack by others
- Is gender and culturally sensitive
- Energizes a group or slows it down, as needed
- Recaps on what has happened in the course and helps group to make connections between the sessions



Training skills

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Level of intervention by facilitator



Trevor Bentley, 2000



Training skills

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Benefits of strong facilitation skills

- Increased ability to manage diverse groups and ensure participants' involvement
- Improved skills for managing conflict
- Better utilization of local knowledge, resources and capacities
- Enhanced collaboration, coordination and understanding among participants
- More effective courses



Training skills

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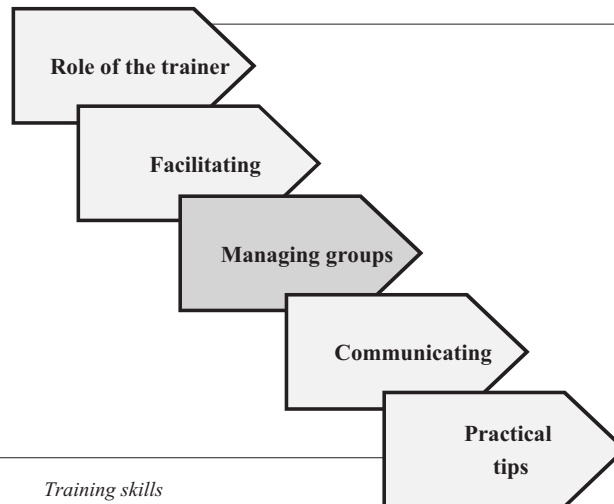
5 minutes break!!



Training skills

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Training Skills



Training skills

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Managing groups

- Monitoring the group
 - Group dynamics
 - Stages of group development
 - Group energy
- Managing conflicts



Training skills

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Group dynamics

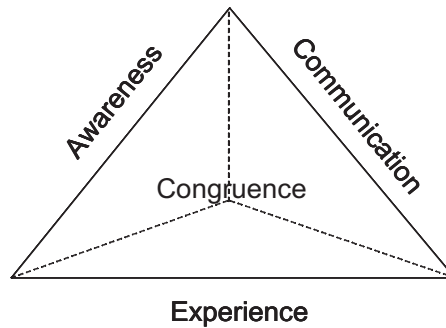
- During the skill-building course, participants learn from :
 - Theory presented by the trainer
 - An example presented by the trainer
 - Through experiential learning, working with their own projects
- A better understanding of group behaviour enables trainer to respond to the group to maximize the participants' activities and contributions



Training skills

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Group dynamics (cont'd)



Trevor Bentley, 2000



Training skills

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Stages of group development

The predictable stages of group development are:

- Forming
- Storming
- Norming
- Performing
- Adjourning

Bruce Tuckman, 1965



Training skills

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Forming stage

- Group members wonder why they are there
- They wonder whether they will be accepted / included in the group's work
- There is little commitment to other individuals in the group, or to the group itself

- *Team-building is important*
- *Developing trust is a central issue*
- *Clarify expectations and provide clear instructions*



Training skills

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Storming stage

- The group members compete for control and want to influence the group's direction
- There is increasing clarity about what the challenges are
- Participants feel some commitment to the group
- The energy level increases and people demonstrate their interest in what is going on
- The group must focus on its objectives

- *Be supportive and encourage leadership for the group and individuals*
- *Monitor the group's progress*



Training skills

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Norming stage

- Participants become aware that everyone fits into the group, objectives become clearer, and patterns of decision-making established
- The group senses its own power and interpersonal battles are settled in favour of the overall objectives of the group
- There is a growing realization of who can do what in moving challenges through the group

- *Recognize individual and group efforts*
- *Provide learning opportunities and feedback*
- *Monitor group energy*



Training skills

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Performing stage

- The performing stage is where most groups try to get straight away: conflicts are handled well, disagreements are strong but they revolve around the “what” and “how” and not the “who”
- Performing means that participants feel good about their involvement; objectives and needs are met and people take responsibility equitably

- *Celebrate the achievements of the group*
- *“Guide from the side”, making minimal interventions and encouraging decision-making and problem-solving attitudes*



Training skills

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Adjourning stage

- The adjourning stage is the break-up of the group, hopefully once the objectives have been reached
- Sadness may be felt if the group experience ends completely
- Discussion on how the group will stay connected is important

- *Acknowledge changes*
- *Provide opportunity for summative evaluations, goodbyes and participants' acknowledgements*



Training skills

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Group development

- The basic stages of group development are related to:
 - Size of the group
 - Amount of time members have been together
 - Changing psychological agenda within the group



Training skills

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Group development (*cont'd*)

- Some groups get stuck at one stage and never seem to progress
- Others move quickly into the performing stage, solving problems effectively and handling their colleagues' needs well
- Facilitators who are too rigid in their control of the group often find that some of the best leaders leave because of their frustration with the trainers' leadership style



Training skills

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Group energy

- Group energy field
- Group physical energy
- Group intellectual energy
- Group emotional energy
- Group spiritual energy



Training skills

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Group energy field

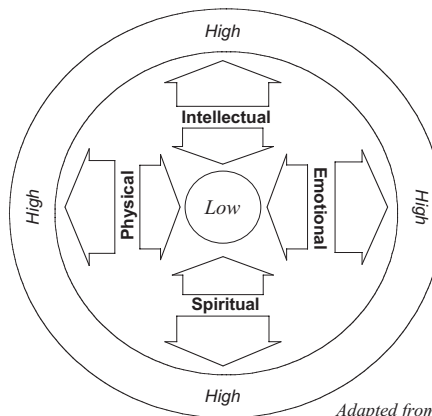
- The energy of a group is composed of 4 main types of energy
 - **Physical** (*level of enthusiasm*)
 - **Intellectual** (*level of involvement in the subject-matter*)
 - **Emotional** (*evolution of emotions*)
 - **Spiritual** (*combination of all the above*)
- The **group energy** reflects the *overall responsiveness* of the group



Training skills

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Group energy field (cont'd)



Adapted from Trevor Bentley, 2000



Training skills

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Monitoring group energy

- At any one time, the group energy lies somewhere between the two extremes
- The trainer assesses and taps into the group energy field to maximize the group participation and interaction



Training skills

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Managing conflicts

- Conflicts within the group may arise and the trainer will have to resolve them
- There are 3 main types of attitude:
 - Aggressive (pushy, self-centred)
 - Nonassertive (modest, withdrawn, letting things happen)
 - Assertive (confident, firm, honest, respecting others)
- *In conflicts, the trainer ensures that participants:*
 - *Avoid personal attacks and stick to the issues*
 - *Emphasize points of agreement*
 - *Avoid “win-lose” position; see positive aspects of both sides*
 - *Be positive and remain flexible*



Training skills

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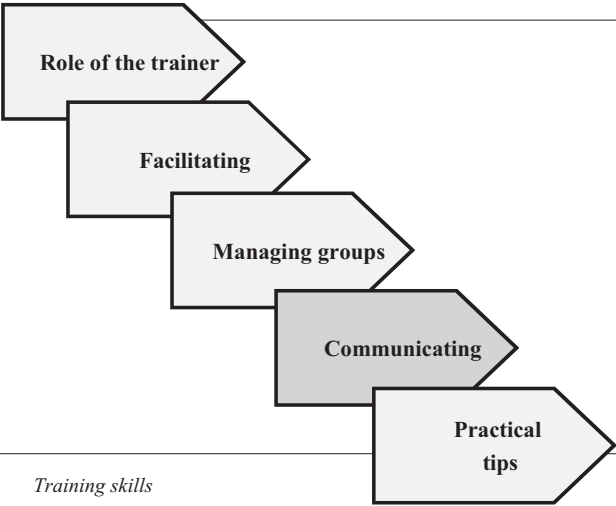
5 minutes break!!



Training skills

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Training Skills



Training skills

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Communicating

- Main communication elements
- Main communication styles
 - Aggressive
 - Nonassertive
 - Assertive



Training skills

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Main communication elements

- Vocal element
 - Relates to how we sound
 - 38% of audience attention
- Visual element
 - Relates to how we appear
 - 55% of audience attention
- Verbal element
 - Relates to what we say
 - 7% of audience attention



Training skills

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Main communication styles

	Aggressive	Nonassertive	Assertive
Tone of voice	Sarcastic, Arrogant, Condescending	Low, Timid, Unsure	Confident, Assured, Steady, Relaxed, Calm
Body posture	Rigid Firm Highly-strung	Bent shoulders, Wants to appear insignificant	Self-assured, Erect, Leans forward



Training skills

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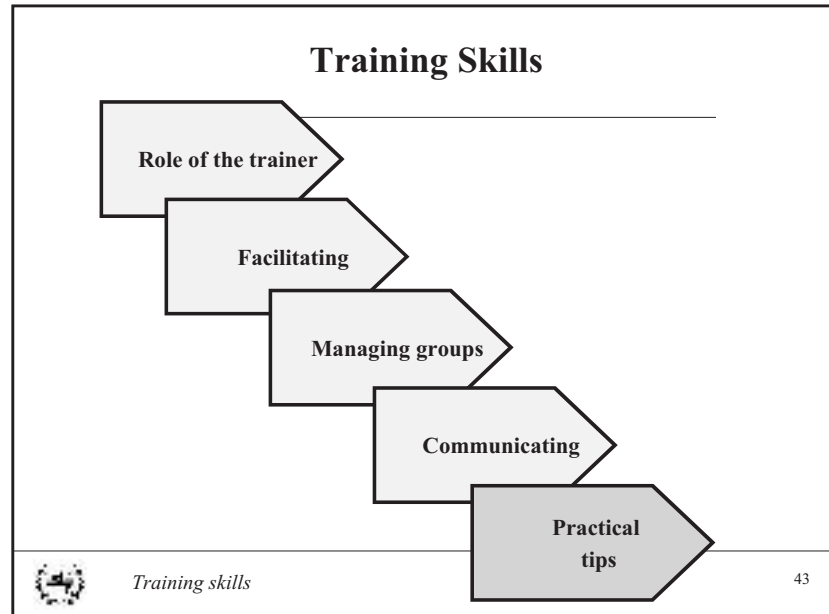
Main communication styles (cont'd)

	Aggressive	Nonassertive	Assertive
Facial expression	Cold, Angry, Staring, Threatening	Shy, Head and eyes downcast	Direct, Smiling, Caring, Serious, Genuine
Hand and arm gestures	Pointing fingers, Shaking fist, Angry movements	Nervous movements, Dropped shoulders	Informal, Relaxed, Spontaneous, Easygoing



Training skills

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Practical tips

- ✓ Be open and flexible, but firm
- ✓ Ensure a conducive course atmosphere
- ✓ Get the best out of participants
- ✓ Remember/use the key elements in communication
- ✓ Conduct a constant evaluation
- ✓ Monitor group dynamics and energy
- ✓ Give appropriate support
- ✓ When a participant talks too long
- ✓ Stop side-conversations
- ✓ When a participant argues obstinately
- ✓ Paraphrase and summarize

 *Training skills* 44

Be open and flexible but firm

- “*An iron hand in a velvet glove*”
- Keep in mind where you want to go
- Be friendly, open, encouraging and respectful; adapt to the group and find the best way to go where you want to go



Training skills

45

Ensure a conducive atmosphere

- Establish “ground rules” based on trust, openness & respect
- Ensure these rules are endorsed/respected
- Make participants feel comfortable
 - *They are the experts*
 - You help them
- Highlight your expectations
- Admit your own mistakes & lack of knowledge
- Keep it **simple**
- Be **brief** and to the point
- Use as little jargon as possible



Training skills

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Get the best out of participants

- Encourage dialogue through eye contact and expression
- Encourage participants, praise them when appropriate
- Ensure that younger participants are not inhibited by seniors
- Be alert for signs of confusion
- Prompt for questions
- Allow time for participants to think, express themselves and answer questions
- **Listen actively**



Training skills

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Get the best out of participants (*cont'd*)

- Use *Socratic approach*
 - **Know** the answer you want
 - **Open** questioning
 - **Paraphrase** participants' answers
 - **Summarize** contributions
 - **Add** your own points



Training skills

48

Use the key elements in communication

- Involve people whenever possible (eye contact, smile, relax, etc.)
- Use specific incidents, anecdotes, personal experiences, metaphors
- Use audiovisual aids to reinforce key points



Training skills

49

Conduct a constant evaluation

- Check that all can see, hear and understand
- Prompt for participants' feedback, comments, questions to assess their understanding and reactions
- Ask your co-trainer for feedback on content and presentation



Training skills

50

Monitor group dynamics and energy

- Ensure physical environment is adequate
- Explain tasks and timeframe for each session
- Be alert for signs of fatigue and take appropriate breaks
- Facilitate the development of the group
- Monitor the level of group energy and adapt/react to it to avoid any disruption



Training skills

51

Give appropriate support

- Do not do the group's work for it
- Circulate and help groups as necessary and clarify points of confusion
- All groups do not need the same level of support; adapt to the needs of each in order to ensure they all follow the process
- Be flexible: you may modify suggested schedules if necessary while keeping in mind the course objectives
- Adapt your approach to the various stages of the course and to the participants' progress



Training skills

52

When a participant talks too long

- Ask another participant to summarize what has been covered up to now
- Give other participants the opportunity to have their say
- Thank the participant and quickly put a question to another participant
- Get confirmation of answers from others before moving ahead



Training skills

53

Stop side-conversations

- Stop talking until the side-conversation stops (very effective)
- Direct a specific question to one of the individuals involved in the side-conversation
- Ask them to share the conversation so that all may benefit from it



Training skills

54

When a participant argues obstinately

- Summarize what has been said and get a common understanding from the group
- Address questions to other participants to get clarity on the issue and then move on



Training skills

55

Paraphrase and summarize

- Paraphrasing (restating using different words) gives a different perspective and helps to ensure a common understanding
- Summarizing helps to:
 - Pull important points together
 - Highlight the group's progress
 - Check for clarity and agreement
 - Emphasize the “take home” message



Training skills

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Conclusion

- In order to reach the course objectives, it is important to manage the group and get the best out of the participants
- Good facilitation, group management and communication skills are essential
- These skills can be strengthened through awareness, preparation and practice



Training skills

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Prepare yourself for a coming skill-building course

“Proper preparation prevents poor performance”

Lenny Laskowski

It is vital that the trainer prepare for the skill-building course thoroughly, as a huge amount of work is covered and accomplished over the four days. The trainer has an active and guiding role at all times, presenting new concepts and tools, facilitating discussions and group work and dealing with unanticipated events that may arise during the course. Your confidence will be higher if you arrive at the course fully prepared.

The following are tips to help trainers to prepare for the course.

GETTING COMFORTABLE WITH THE TRAINING CONTENT AND METHODOLOGY

Read, understand and become comfortable with the content of the training material:

- training manual for trainers
- step-by-step guide for trainers
- train-the-trainer manual
- CD-ROM for trainers.

Read the participants' project summaries and prepare your own version of each project's purpose and scope:

- › read the project summaries and additional project documentation sent by the participants prior to the course
- › from each project summary, prepare your own version of the project's purpose and scope:
 - project statement
 - project goal
 - project objectives
 - key indicators for each objective
 - main steps.

In most cases, there will be four different projects which will be worked on during the course. You will help participants to refine their work and lead the discussion/feedback during the case studies. Developing drafts of the project statement, goal, objectives, indicators and main steps for the specific projects will allow you to become more familiar with the participants' projects and to react more quickly when facilitating the case study sessions. However, bear in mind that there are several ways of defining the project's scope and purpose: you should always be flexible and open to appropriate alternatives which participants may suggest.

Rehearse until you are fully confident at delivering **all** the presentations. Up to three rehearsals is ideal: first you master the content, then you work out the slide transitions and finally you control the duration of the presentation. You could ask friends or colleagues to sit in and provide their input.

Practise giving the Microsoft Project and Microsoft PowerPoint demonstrations, going through the sections of the *Step-by-step guide* related to the use of these software packages. Before the start of the course, you should be confident with these basic steps of *Microsoft Project* and *PowerPoint*. Once again, you can ask your friends and colleagues to sit in and provide input.

For management of the group and facilitation of case study sessions, refer to the "Training skills" section above.

GETTING FAMILIAR WITH THE COURSE SCHEDULE – TIME MANAGEMENT

Approximately 80% of the course will be spent on case studies, and it is important to manage time effectively in order to reach the course objectives. Participants may be at different levels and work at different speeds. As a trainer, you must accommodate all participants and yet ensure that all the steps have been completed by the end of the course.

If, for unpredictable reasons, some participants arrive late, you may want to brief them as soon as possible (during the coffee break/evening) so that they can catch up and follow the course in sequence.

At the beginning of each day and each module, spend 10 minutes reviewing and checking that key messages, concepts and definitions have been understood.

Proposed agenda for the four-day skill-building course

Table 4 presents an overview of the programme followed during the skill-building course, to be covered in four full days. However, if necessary, the same programme can be scheduled over five days, allowing more flexibility in the daily schedule.

Table 4 Proposed agenda for the four-day skill-building course

	Day 1		Day 2		Day 3		Day 4
AM	Introduction & objectives		Case studies (module 3)		Case studies (module 4)		Implementing / monitoring (module 5)
	Good practices (module 1)						
	Planning value (module 2)		Planning (module 4)				Case studies (module 5)
PM	Defining purpose & scope (module 3)		Case studies (module 4)		Case studies (module 4)		Course assessment
	Case studies (module 3)						Discussion & next steps

Course schedule and suggested allocation of time

The suggested allocation of time for each module and for the various activities planned for each one is indicated in Table 5. One period corresponds to half a day. **As mentioned earlier, this is only a suggestion, which needs to be adapted to the “rhythm” of each group.** Flexibility with respect to time is one of the key aspects the trainer should concentrate on, while keeping the group focused to reach the course objectives by the end of the four days.

In general, theoretical presentations for the introduction and modules 1-5 should take no longer than 30-45 minutes. During the case study sessions, the trainer must manage the time to be allocated to group preparation, group work and plenary discussion following each group presentation.

Table 5 Suggested allocation of time for the skill-building course

Course Sessions	Day	Activities		Suggested Time Allocation
Introduction & overview	1st period	Welcome & introduction to all present – slide presentation given by trainer		45-60 min
Module 1 Good practices	1st period	Theory	Presentation by trainer	30-45 min
Module 2 Value of planning	1st period	Theory	Presentation by trainer	30-45 min
Module 3 Defining purpose & scope	2nd & 3rd periods	Theory	Presentation by trainer	30-45 min
		Presentations of project summaries by participants		20 min (5' x 4 groups)
		Case studies for each step: (1) working groups (2) group presentation/discussion – x 4 groups	Phase 1a	(1) 45 min (2) 60 min (15' x 4 groups)
			Phase 1b	(1) 60 min (2) 120 min (30' x 4 groups)
			Phase 1c	(1) 30 min (2) 45 min (~10' x 4 groups)

Course Sessions	Day	Activities		Suggested Time Allocation
Module 4 Planning	3rd, 4th, 5th, 6th periods	Theory	Presentation by trainer	30-45 min
		Case studies	Phase 2 a, b & c Gantt chart	7 hrs
			PERT chart	3 hrs 30 min
			Group presentation & discussion	90 min (~20-25' x 4 groups)
Module 5 Implementing/ evaluation	7th period	Theory	Presentation by trainer	30-45 min
		Case studies (1) Working groups (2) Presentation/ discussion	Phase 3a & b	(1) 90 min (2) 90 min (20-25' x 4 groups)
Course assessment	8th period	(1) Open discussion (2) Questionnaires to be filled in by participants and trainers		2 hrs
Next steps	8th period	Final discussion & next steps		1 hr

Some tips for time management during the case study sessions

Four groups, each working on one project, should be formed prior to the course.

- Explain the timeframe and tasks to the groups at the beginning of each case study session. Thereafter, spend sufficient time with each group to be certain they have grasped the tasks and the concepts supporting them.

- While the groups are working on their case studies, circulate and check on their progress, providing guidance where required, but do not become a permanent part of any one group.
- If the schedule is running late, make up time by:
 - shortening the refreshment or lunch breaks
 - allowing “slower” groups to work after the scheduled times
 - assigning “homework”, if necessary
 - starting earlier the next morning.

ENSURING THAT THE VENUE AND EQUIPMENT ARE APPROPRIATE AND WELL ORGANIZED

The trainer should double-check that everything is in place at least one day before the course starts.

Prepare the room

Rearrange the positioning of seats/tables and computers, if necessary. Set up a “U-shaped” seating distribution if feasible. This is ideal for face-to-face contact and facilitates discussion. Make sure also that all participants can see the screen, and that computers are not obstructing the view.

Check equipment and materials

Make sure there are enough computers for the groups to work (one computer per group).

Check that each computer has *Microsoft Project* and *Microsoft PowerPoint* software programmes installed. In some cases, the trainer will bring CDs of the software (and licenses) and install them personally.

If the participants bring their own laptops, the trainer needs to make sure that *Microsoft Project* is installed on their computers during the first day of the course.

Check the data projector: adjust the image on the screen or project the image on to a light-coloured wall.

Remember: Check all equipment and materials, and contact IT support if necessary!

ORGANIZING CO-TRAINING

Early communication between the co-trainers is essential for good preparation. Each trainer’s responsibility for the various tasks involved in organizing and running the course must be clearly laid down in advance.

Before the course

The trainers should communicate at least two months before the course starts in order to allocate and clearly define their respective responsibilities and ensure that all administrative and organizational tasks are taken care of. If a task is delegated, the trainer in charge of the task concerned should supervise it in order to ensure that everything will be ready to run the course on time.

Both trainers should prepare and be confident with:

- **all** presentations of the course module
- **both** software demonstrations.

This way you will be prepared to support or, if necessary, to replace your co-trainer.

If trainers need to travel to the course venue, they should arrive at least 1-2 days before the course starts. Together, they will verify that all is in place and make final arrangements (see section *“Organizing a skill-building course”*).

During the course

Both trainers should be actively involved in the training activities during the whole course. While one trainer presents, the other trainer needs to monitor the group dynamics, take notes and make sure that all key messages are understood by participants. The co-trainer can provide additional comments and clarification at the end of the presentation. Trainers should complement one another at all times. Break times provide ideal opportunities for solving any logistic or administrative issues.

At the end of each day, the trainers have a debriefing session to discuss:

- how the course is running
- whether there is any need to adjust the time schedule
- whether key messages have been understood by the participants
- logistic and administrative issues.

After the course

The work is not over yet. Trainers need to prepare the course report, ideally within two days. If trainers are not in their home institution, they should remain at the venue for 1-2 days to prepare their report. The report is comprehensive and covers all topics listed in the section *“Organizing a skill-building course”*, subsection *“Course report format”*. The trainers decide how they will share the course follow-up and provide support for the revision of the project documentation.

Train-the-trainer course

Prepare yourself
for a coming
skill-building course



Prepare yourself for a coming skill-building course

1

Train-the-trainer course

*"Proper preparation prevents poor
performance ..."*

Lenny Laskowski



Prepare yourself for a coming skill-building course

2

Benefits of preparation

- Allows for smooth facilitation of course
- Increases your confidence
- Greatly assists with managing unforeseen problems that may arise during the course



Prepare yourself for a coming skill-building course

3

Prepare yourself for a coming skill-building course

- Getting comfortable with the training content and methodology
- Getting familiar with the course schedule - time management
- Ensuring the venue and equipment are appropriate and well organized
- Organizing co-training



Prepare yourself for a coming skill-building course

4

Getting comfortable with the training content and methodology

- Prior reading
- Prepare your own version of the purpose and scope of the participants' projects
- Practise slide presentations and software demonstrations



Prepare yourself for a coming skill-building course

5

Prior reading



- Read, understand and become comfortable with the training material:
 - *Training manual for trainers*
 - *Step-by-step guide for trainers*
 - *Train-the-trainer manual*
 - *CD-ROM for trainers*
- Read through each project summary and additional project information provided by the participants



Prepare yourself for a coming skill-building course

6

Prepare your version of the purpose and scope of projects

- Going through project summaries, prepare your own version of:
 - Project statement
 - Goal
 - Objectives
 - Key indicators for each objective
 - Main steps
- This will help you to facilitate the discussions during the case study sessions
- However, stay flexible! There are many ways of wording the purpose and scope of a project



Prepare yourself for a coming skill-building course

7

Practice, practice, practice

- Rehearse **all** the presentations until you are familiar with their content, the slides transition and the duration of the presentation
- Practise the software demonstrations, going through the basic steps described in the *Step-by-step guide*. If possible, ask your colleagues to sit in and provide their input
- For group management and facilitation of case study sessions refer to the “Training Skills“ section of the *Train-the-trainer manual*



Prepare yourself for a coming skill-building course

8

Getting familiar with the course modules schedule - time management

- As ~80% of the course time is allocated to case studies, it is important to manage time effectively
- Be aware that participants may be at different levels and work at different speeds during case study sessions
- The trainer has to be flexible, yet make sure that all steps have been completed by the end of the course
- If, for **unpredictable** reasons, participants arrive late, brief them as soon as possible
- At the beginning of each day, use 10 minutes to review key messages, concepts and definitions presented in previous sections



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Skill-building course agenda

	Day 1	Day 2	Day 3	Day 4
AM	"Introduction & objectives"	Case studies (module 3)	Case studies (module 4)	"Implementing /monitoring" (module 5)
	"Good practices" (module 1)	"Planning" (module 4)		"Case studies" (module 5)
	"Planning value" (module 2)			
PM	"Defining purpose & scope" (module 3)	Case studies (module 4)	Case studies (module 4)	Course assessment
	Case studies (module 3)			Discussion & next steps



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Suggested time allocation

COURSE SESSIONS	DAY	ACTIVITIES		SUGGESTED TIME ALLOCATION
"Introduction & overview"	1 st period	Welcome & introduction to all present slide presentation given by trainer		45-60 min
MODULE 1 "Good practices"	1 st period	<u>Theory</u>	Presentation by trainer	30-45 min
MODULE 2 "Value of planning"	1 st period	<u>Theory</u>	Presentation by trainer	30-45 min

This is a suggestion. The trainer must be sensitive to the group rhythm yet remain focused on the course objectives.



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Suggested time allocation (cont'd)

MODULE 3 "Defining purpose & scope"	2 nd & 3 rd periods	<u>Theory</u>	Presentation by trainer	30-45 min
		Presentations of project summaries by participants		20 min (5' x 4 groups)
		<u>Case Studies</u> for each step: (1) working groups, (2) group presentation / discussion x 4 groups	Phase 1 a	(1) 45 min (2) 60 min (15' x 4 groups)
			Phase 1 b	(1) 60 min (2) 120 min (30' x 4 groups)
			Phase 1 c	(1) 30 min (2) 45 min (~10' x 4 groups)

This is a suggestion. The trainer must be sensitive to the group rhythm yet remain focused on the course objectives.



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Suggested time allocation (cont'd)

MODULE 4 "Planning"	3 rd , 4 th , 5 th & 6 th periods	<i>Theory</i>	Presentation by trainer	30-45 min
		<i>Case Studies</i>	Phase 2 a, b & c Gantt chart	7 hrs
			PERT chart	3 hrs 30 min
			Group presentation & discussion	90 min (~20-25' x 4 groups)

This is a suggestion. The trainer must be sensitive to the group rhythm yet remain focused on the course objectives.



Prepare yourself for a coming skill-building course

13

Suggested time allocation (cont'd)

MODULE 5 "Implementing/evaluation"	7 th period	<i>Theory</i>	Presentation by trainer	30-45 min
		<i>Case Studies</i> (1) Working groups (2) Presentation / discussion	Phase 3 a & b	(1) 90 min (2) 90 min - (20-25' x 4 groups)
"Course assessment"	8 th period	(1) Open discussion (2) Questionnaires to be filled in by participants		2 hrs
Next steps	8 th period	Final discussion		1 hr

This is a suggestion. The trainer must be sensitive to the group rhythm yet remain focused on the course objectives.



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Tips for time management during case study sessions

- Four groups should be formed prior to the course
- Explain the timeframe and tasks at the beginning of each case study session
- During case studies, circulate among the groups to check on their progress and provide guidance
- Make up time if necessary by:
 - ✓ Shortening refreshment or lunch breaks
 - ✓ Allowing slower groups to work after the scheduled times
 - ✓ Assigning “homework“, if necessary and if possible, for the evening
 - ✓ Starting the next session earlier on the following day.



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Ensuring the venue and equipment are appropriate and well organized

***Verify that everything is in place at least one day before
course starts***

- Prepare the room
 - ✓ Rearrange seats/tables and computers, if necessary
 - ✓ “U-shaped” seating distribution is ideal
 - ✓ Make sure everyone can see the screen
- Check equipment and materials
 - ✓ 1 computer/group with MS Project and MS PowerPoint
 - ✓ Data projector: adjust image on a screen/light-coloured wall
- Contact IT support if necessary!



Prepare yourself for a coming skill-building course

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Organize co-training

- Before the course
- During the course
- After the course



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Before the course

- Identify your co-trainer
- Communicate at least 2 months before
- Allocate and clearly define responsibilities
- Both trainers to prepare **all** module presentations and **both** software demonstrations to ensure backup options
- Arrive at the venue 1-2 days beforehand
- Make final arrangements to run the course



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During the course

- Both trainers run the course, with complementary roles
- Use “break times” to solve logistic and administrative issues
- At the end of each day, hold “debriefing sessions” to discuss:
 - How the course is running
 - The need to adjust the time schedule
 - Whether key messages were understood by the participants
 - Logistic and administrative issues



Prepare yourself for a coming skill-building course

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After the course

- Prepare the course report during the 1 or 2 days following the course
- For report content and structure, refer to “*Organizing a skill building course*” section
- Decide by whom, when and how the course will be followed up (project documentation revised)



Prepare yourself for a coming skill-building course

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Summary – prior to the course ...

- ✓ Read through training material and project summaries
- ✓ Prepare drafts of project documentation
- ✓ Rehearse the presentations
- ✓ Practise giving the Microsoft Project and Microsoft PowerPoint demonstrations by following the steps in the *Step-by-step guide for trainers*
- ✓ For preparation of the case study sessions, refer to the “Training Skills” section of the *Train-the-trainer manual*
- ✓ Review the information on time management in the *Train-the-trainer manual* to help you to manage time effectively during the course
- ✓ Co-trainers should communicate and decide how they will share responsibilities before, during and after the course



Prepare yourself for a coming skill-building course

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Organizing a skill-building course

The following checklist will help you to plan and organize a skill-building course. All tasks related to the course organization remain the responsibility of the trainers. Therefore, if trainers delegate a task, they should carefully follow up and make sure tasks have been completed. This list helps the trainer to check whether everything required to run a skill-building course is in place.

IDENTIFY AND SELECT PARTICIPANTS

- › It is important to know beforehand the number of participants in the skill-building course (ideally 12 individuals).
- › Participants will usually be students and young and senior researchers.
- › Participants may also be programme or department heads attending the course in order to understand it more clearly and explore its possible integration into their institution.
- › A few of the selected participants may be individuals who have been identified as potential new trainers.
- › Participants need to commit and ensure that they will be available for the whole duration of the course. As this is a step-by-step approach, their participation in each step is essential.

ARRANGE COURSE LOGISTICS

- › Decide on dates for the course.
- › Find a suitable venue. Ensure that the venue will provide the best location and infrastructure to run the course. If possible, carry out a site inspection or find information on the Internet and obtain quotes.
 - Decide between a “residential” and a “nonresidential” course. As full attendance at the course is vital, residential venues are ideal. However, you need to take into account how this will impact on the course budget.

- In the case of a nonresidential course, it is preferable to have the venue located near the place where meals will be served and participants accommodated (if applicable). Ideally, lunch will be a buffet served at the course venue.
- Internet access at the venue is welcome. However, try to avoid providing Internet access on individual computers during the course, as this can be very disruptive.
- Make sure that there is enough space for all participants and for group work, and enough computers.
- Ensure that the required equipment (computers, printers and data projector) and technical assistance are available on site throughout the course.
- › Draw up a provisional budget (obtain quotes) for:
 - possible venues (if applicable)
 - accommodation (if applicable)
 - stipends/per diem allowances (if applicable)
 - travel and transport (if applicable)
 - equipment (computers, printer and data projector)
 - training documentation (if applicable)
 - social events (if applicable).
- › If the course is sponsored, the funds should be received by the organizing institution at least four weeks before the course starts.
- › Organize and arrange (set deadline dates and make sure they are met) for:
 - invitations to be sent to participants, with a copy to their supervisor – use the “Invitation package” containing the invitation letter (template available in the CD-ROM for trainers), the *Planning for success* initiative document and brochure
 - deadline for acceptance by participants
 - deadline for participants to provide a brief summary of their project
 - request to participants to prepare a five-minute presentation about their project, which they will present during the course
 - request to participants to bring their own laptops (discuss insurance coverage while at your institution) and adaptors if possible – ask them confirm this to you and inform you which operating system is installed on their computer – this will allow you to check if it is compatible with the version of *Microsoft Project* to be installed
 - accommodation (if applicable)
 - transport arrangements (if applicable):
 - participants should arrive at least one day before the course starts to guarantee attendance
 - trainer or co-trainers should arrive one or two days before the course to leave time for preparation, and stay at least one day after the course to allow for initial writing of the report.

- › Invite the head of the institution to open and close the course and distribute the certificates of attendance (if applicable).
- › Finalize the venue, accommodation reservations and transport arrangements. Arrange for per diem allowances (if applicable) to be paid on the first day of the course.
- › Communicate to participants:
 - venue details
 - transport information (if applicable)
 - accommodation details and per diems (if applicable)
 - course agenda
 - list of participants.

PREPARE MATERIALS AND EQUIPMENT

- › Materials for **trainers**:
 - your copy of the *Training manual for trainers*
 - your copy of the *Step-by-step guide for trainers*
 - your copy of the *CD-ROM for trainers*
 - agenda
 - list of participants
 - computer diskette, writeable CD or USB device to save files of case study outcomes, Gantt & PERT charts and questionnaires.
- › Materials for **each participant**:
 - one copy of the *Training manual for participants*
 - one copy of the *Step-by-step guide for participants*
 - one copy of the *CD-ROM for participants*
 - confidentiality agreement form (if applicable)
 - agenda
 - list of participants and their contact details
 - copy of each project summary
 - name tag or name board
 - writing book or paper
 - pencil and eraser
 - computer diskette, writeable CD or USB device to save files of case study outcomes, Gantt & PERT charts and questionnaires, if participants are not working with their own computers
 - certificate of attendance, if applicable – when preparing the certificate, decide who will sign it (trainer and/or head of institution and/or WHO representative).

- Additional course materials:
 - transparencies and appropriate pens
 - flipcharts and appropriate pens
 - pencil sharpeners
 - paper for printer
 - laser pointer
 - extension cord, multi-plug board and plug adaptors.
- Equipment
 - **licence** for *Microsoft Project* software programme for participants
 - **computers** with *Microsoft PowerPoint* and *Microsoft Project* – one for each group (trainers may need to bring *Microsoft Project* licenses and install them on the computers)
 - **data projector** and a backup option
 - **printer** (specify speed) to print case study documents, Gantt and PERT charts.

FINAL ARRANGEMENTS AT THE END OF THE COURSE AND AFTERWARDS

- Wrap up financial matters (if applicable)
 - account and per diem payments
 - reimbursements
 - income and expenditure report.
- Distribute certificate of attendance (if appropriate).
- Respect licence rights when making *Microsoft Project* software available to participants.
- Save questionnaires and project documentation files electronically for your report (remember that the documentation relating to each project should be saved in a separate *Microsoft PowerPoint* file).

COURSE FOLLOW-UP

- Write the report of the course in the 1-2 days following the course, using the steps described in the CD-ROM for trainers (see the “course report format” section below).
- Provide support for participants as they finalize the project development documentation with the project development team.
- At the end of the course, participants should have developed a draft of the documentation for the development of their project. **The project documentation should be prepared as a single presentation file (using e.g. *Microsoft PowerPoint*) and should include:**
 - purpose and scope of the project (statement, goal, objectives, indicators, main steps)
 - Gantt chart

- PERT chart
- definition of the project development team (members' names, expertise, responsibilities) and the team's work process
- structure of reports (progress and final).

After the course, participants should ensure that the project documentation is reviewed, revised and endorsed by all members of the project development team. Trainers set deadlines for submission of the revised documentation and support participants as they:

- formally establish the project development team, if that has not already been done
 - organize an initial meeting of the project development team to discuss and review the project documentation developed during the course
 - revise the project development documentation and share it with the course trainer for comments and suggestions (**within three weeks of the end of the course**)
 - interact with the project team and with the course trainer in order to finalize the project development documentation
 - send to the trainer(s) **within 6-8 weeks of the end of the course** the finalized project development documentation (as a single *Microsoft PowerPoint* presentation).
- When you have received **all** the revised project documentation (eight weeks after the course) send your completed report to the commissioning organization.

COURSE REPORT FORMAT

The trainer must prepare a course report. Organize your report using the format provided below:

Report (single text file)

The main part of the report should be saved as a **single** text file and include:

- cover page (course dates, venue and trainers' details)
- table of contents
- report summary in English
- agenda
- list of participants (including participants' names, institutions, expertise and contact details)
- project summaries and case study working group composition
- summary of the course assessment by participants (discussion and questionnaires) including selected quotes from participants
- lessons learned and recommendations
- financial report, if applicable.

Appendix A (single file)

- Questionnaires completed electronically by each participant at the end of the course. The electronic version of the questionnaire may be found in the *CD-ROM for participants*.
- Questionnaires completed electronically by each trainer at the end of the course. The electronic version of the questionnaire may be found in the *CD-ROM for trainers*.

Appendix B (single Microsoft PowerPoint file)

Project documentation developed during case study sessions for each group, i.e. project purpose and scope, Gantt chart, PERT chart, project development team definition, team work process and structure of the report.

Appendix C (single Microsoft PowerPoint file)

Project documentation developed during the case study session and revised by the respective project development teams **(to be submitted within eight weeks of the end of the course)**.

Train-the-trainer course

Organizing a skill-building course



Organizing a skill-building course

1

Organizing a skill-building course

- Identify and select participants
- Arrange course logistics
- Prepare materials and equipment
- Final arrangements at the end of the course and afterwards
- Course follow-up
- Course report format



Organizing a skill-building course

2

Identify and select participants

- ✓ Set the number of participants (max. 12)
- ✓ Select participants
 - Students/Researchers (young/senior)
 - Programme/Department Heads (to explore integration of the course)
 - Individuals targeted as potential trainers
 - Participants should commit and ensure they will be available for the whole duration of the course



Organizing a skill-building course

3

Course logistics

- ✓ Decide on dates for the course
- ✓ Select a suitable venue
 - Residential vs nonresidential course
 - Lunch and coffee breaks close by
 - Internet access is welcome, but not to individual computers during the course as it may be disruptive
 - Appropriate size of meeting room
 - Audiovisual equipment and computers available
 - Technical assistance on site



Organizing a skill-building course

4

Course logistics (cont'd)

- ✓ Draw up a provisional budget (as applicable)
 - Venue
 - Accommodation
 - Stipend/per diems
 - Travel and transport
 - Equipment (computer, video projector, etc)
 - Training documentation
 - Social events

If course is sponsored, funds should be sent to organizing institution at least 4 weeks in advance



Organizing a skill-building course

5

Course logistics (cont'd)

- ✓ Organize and arrange (set deadlines):
 - Send “invitation package”
 - Receive participants' acceptance
 - Receive project summaries from participants
 - Participants to prepare a 5-min PowerPoint presentation on the project
 - Participants to bring their own laptop if possible
 - Arrange accommodation and transport
 - Participants to arrive 1 day before course starts
 - Trainer(s) to arrive 1 or 2 days before the course and stay at least 1 day after the course to write report
 - Invite head of institution to open and close the meeting (if applicable)



Organizing a skill-building course

6

Course logistics (cont'd)

- ✓ Finalize arrangements:
 - ✓ Finalize venue, accommodation and transport reservations
 - ✓ Organize per diems (if applicable) to be paid on the first day of the course
 - ✓ Communicate to participants:
 - Venue details
 - Transport information
 - Accommodation details and per diems
 - Course agenda
 - List of participants



Organizing a skill-building course

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Preparation of material and equipment

- ✓ Materials for trainers
- ✓ Materials to prepare for each participant
- ✓ Additional course materials
- ✓ Equipment



Organizing a skill-building course

8

Materials for trainers

- ✓ *Training manual for trainers*
- ✓ *Step-by-step guide for trainers*
- ✓ *CD-ROM for trainers*
- ✓ *Agenda*
- ✓ *List of participants*
- ✓ *Computer diskette, rewriteable CD, USB device to save participants' working documents*



Organizing a skill-building course

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Materials to prepare for each participant

- ✓ 1 copy of the *Training manual for participants*
- ✓ 1 copy of the *Step-by-step guide for participants*
- ✓ 1 copy of the *CD-ROM for participants*
- ✓ Confidentiality agreement form to be signed
- ✓ Course agenda
- ✓ List of participants and their contact details
- ✓ Copy of each project summary



Organizing a skill-building course

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Materials to prepare for each participant

(cont'd)

- ✓ Name tag or name board
- ✓ Writing book or paper
- ✓ Pencil & eraser
- ✓ Computer diskette, rewriteable CD or USB device to save files of case studies, if not working with own computers
- ✓ Certificate of attendance (if appropriate) – decide who will sign the certificate



Organizing a skill-building course

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Additional course materials

- ✓ Transparencies and pens (optional)
- ✓ Flipcharts and pens (optional)
- ✓ Pencil sharpeners
- ✓ Paper for printer
- ✓ Laser pointer
- ✓ Extension cord, multi-plug board and adaptors



Organizing a skill-building course

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Equipment

- ✓ Licence for Microsoft Project software
- ✓ Computers with Microsoft PowerPoint and Microsoft Project - 1 for each group (trainers may need to install Microsoft Project on the computers)
- ✓ Data projector and a backup option
- ✓ Printer (specify speed)



Organizing a skill-building course

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Final arrangements at the end of the course and afterwards

- ✓ Financial wrap-up
 - Account and per diem payments
 - Reimbursements
 - Income and expenditure report
- ✓ Distribute certificate of attendance (if applicable)
- ✓ Respect licence rights when supplying Microsoft Project software to participants
- ✓ Compile:
 - Questionnaires filled in electronically
 - Project documentation saved in a single Microsoft PowerPoint file



Organizing a skill-building course

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Course follow-up

- ✓ Write the course report in the 1-2 days after the course
- ✓ Set deadlines for reception of the revised documentation and support participants in :
 - Formally establishing the project team
 - Holding a team meeting to review the project documentation
 - Revising the project documentation (within 3 weeks)
 - Ensuring they submit the **revised** version within 6-8 weeks as a single PowerPoint presentation
- ✓ After **all** final project documentation is received, send the complete report to the commissioning organization



Organizing a skill-building course

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Course report format

- If the Internet is available, please refer to the *Planning for success* initiative web-based share site to report
- The main report should be a **single text file** comprising:
 - Cover page (course date, venue, trainers' details)
 - Table of contents
 - Report summary in English
 - Agenda
 - List of participants
 - Project summaries
 - Summaries of course assessment by participants (discussion, questionnaires, selected quotes)
 - Lessons learned and recommendations
 - Financial report (if applicable)



Organizing a skill-building course

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Course report format *(cont'd)*

3 appendices attached to the main report file:

- **Appendix A (single file):**
 - Questionnaires completed by participants (from the *CD-ROM for participants*)
 - Questionnaires completed by trainers (from the *CD-ROM for trainers*)
- **Appendix B (single file):**
 - Project documentation drafts developed during the course (one file for each project)
- **Appendix C (single file):**
 - Project documentation revised by project teams (to be submitted 6-8 weeks after the end of the course)



Organizing a skill-building course

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Summary

- ✓ Identify and select participants
- ✓ Organize date, location and budget for the course
- ✓ Send invitations to participants with deadline to respond
- ✓ Arrange for accommodation, per diems and transport
- ✓ Set deadline date for submission of participants' project summaries
- ✓ Order stationery and Microsoft Project software licenses and prepare training materials for participants
- ✓ Arrange for electronic equipment
- ✓ Circulate background documents to participants
- ✓ Course follow-up and report



Organizing a skill-building course

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Skill building

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in Tropical Diseases (TDR) sponsored by**
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