# Project Management and Proposal Writing Workshop
# Lusaka, Zambia
# Aug 30-31 1999

## Mon, Aug 30

| | |
|---|---|
| 8:30 – 9:00 | Introduction of participants and trainers<br>Networking & Formation of work teams |
| 9-10:30 | Project Life Cycle – Overview<br>Needs Assessment & Problem Identification<br>Project Stages, Goals and Objectives |
| !0:30-10:45 | Tea Break |
| 10:45-12:00 | Project Planning |
| 12:00- 13:00 | Lunch |
| 13:00-14:00 | Project Planning (cont) |
| 14:00-1500 | Project Reporting |
| 15:00-15:30 | Tea Break & Networking |
| 15:30-16:00 | Project Evaluation |
| 16:00-16:30 | Information Sources |
| 16:30-17:00 | Review & Open Discussion |

## Tuesday, Aug 31

| | |
|---|---|
| 8:30-8:45 | Identifying Funding Opportunities |
| 8:45- 9:15 | Technical and Economic Feasibility |
| 9:15-10:30 | Identifying Stakeholders |
| !0:30-10:45 | Tea Break |
| 10:45-12:00 | Writing the Proposal |

| | |
|---|---|
| 12:00- 13:00 | Lunch |
| 13:00-13:30 | Writing the Proposal (cont) |
| 13:30-14:30 | Proposal Critique |
| 14:30—14:45 | Tea Break & Networking |
| 14:45-15:30 | Wrapup & Review |
| 15:30-15:45 | Workshop Evaluation |
| 15:45-17:00 | Open Discussion<br>Networking |

**Project Management and Proposal Writing Workshop**
Lusaka, Zambia
August 30 & 31, 1999

The objective of this training is to develop skills necessary for successful project management and proposal writing.

Students will explore the two following areas:

**I. Project Life Cycle including**:

- C Needs Assessments
- C Problem Identification
- C Information Sources
- C Project Goals & Objectives
- C Project Planning
- C Project Reporting
- C Project Evaluation

**II. Proposal Writing including:**

- C Identifying funding organizations
- C Technical feasibility
- C Economic feasibility
- C Identifying stakeholders
- C Political support
- C Proposal Outline

**Workshop Methodology**:

A. Teaming activities; facilitator led group discussions.
B. Workshop teaming; four teams, a team leader and recorder will be used to address the specific cases during the workshop. You will stay in these teams for the entire workshop.
C. Materials; each team will have ample flipcharts, markers and extra paper as needed.
D. Localization; assigned scenarios are local. Use what you know about Zambian agriculture and economics to address the issues.
E. Notes; make sure to record pertinent information (especially contact information) in your notebooks.

# INTRODUCTION

**Activity 1 - Networking (10 minutes)**
Develop a database of potential collaborators by interest area and skills. Introduce yourselves and your specialization or interest area. Include contact information. Team members should note names, addresses and specializations for future collaboration

**Activity 2**
Form four teams with a team leader and recorder for each team (make sure two PAAZ members are on each each team). Decide on a professional name for your team. Use this name on your flip charts. Record team names and members on a flip chart and post on wall. Post networking information below.

Networking information:

# PROJECT LIFE CYCLE:

**Overview:** This session focuses on steps involved in planning, implementing and evaluating development projects. The steps are applicable to most projects regardless of topic or content.

## Activity 1 - Needs Assessment and Problem Identification: (30-45 min)

You are the Minister of Agriculture and having your first strategic planning session with your advisors. After many hours of brainstorming you finally settle on three potential projects to present to the Minister of Finance and other ministers on the national strategic planning committee (this meeting is in 2 hours). In order to be as prepared as possible, you are going to try and anticipate the questions the committee will ask about your three projects.

A. Make a priority list of the questions you think the committee will ask about your projects. (You don't need to define your projects in order to do this)
B. Record the questions on a flip chart.
C. Discuss lessons learned from exercise and record on chart labeled "Why make Needs Assessments. Post chart on wall.

## Activity II – Review Project Life Cycle Chart (10-20 min)

## Activity III – Review Project Life Cycle Stages (10-20 min)

## Activity IV – Discuss "Goals" and "Objectives" (10-20 min)

# PROJECT LIFE CYCLE

Insert project life cycle chart here (page 90 from Uganda manual)

# PROJECT LIFE CYCLE - STAGES

**Assess Needs** -- A formal and informal process of determining the needs of a group or community.

**Identify and Define Problems** – Focusing and identifying specific problems that cause a need. It usually assesses the project setting. Defining a problem provides focus and direction for a project, looking beyond symptoms.

**Define Project Goals and Overall Strategy** – What do you want to happen as a result of your project? How will you do that? A project goal describes what you expect the project setting to be like after your project is finished.

**Select Project Objectives** – Objectives are a series of specific accomplishments designed to address the stated problems and attain the stated goal. Objects should be SMART.

**Determine Activities and Prepare Workplan** – A specific plan of action to accomplish your objectives. What do you need to do? Usually includes a timeline, person(s) who will carry out the activities, and resources needed to carry them out.

**Develop Monitoring and Evaluation Plan** – A process for routinely gathering information on all aspects of the project – such as the use of time, people, money, and other resources as well as results and impact. Evaluation involves analyzing information to determine if the project is achieving its stated objectives through these activities. Evaluation is done periodically rather than continually, including at the end of the project. The plan states who, what, when, and how this will be done.

**Develop a Staffing and Training Plan** – A job description for employees and volunteers that clarifies who is responsible for carrying out specific tasks. May also include plans for training and preparing those staff persons not fully qualified or skilled to carry out their assigned tasks.

**Establish Recordkeeping System** – A system for keeping data that indicates you are reaching objectives and expending resources as planned. The system should be as simple as possible while still helping to gather the essential data.

**Determine Budget** – Financial plan providing donors, project implementers, and managers with financial information on how much it will cost to carry out a particular project.

**Start-Up Activities** – Preliminary work that must be done before the ongoing and routine aspects of a project can begin.

**Undertake Activities** – Carry out your project as planned.

# GOALS

A project goal briefly describes what you expect the project setting to be like after your project has completed its intervention.

- A goal is the solution to the problems you described earlier. Your problem statement was limited to those specific problems that could be solved by the project. Your goal statement represents the solution.

- A goal is realistic. Do not state that your project will accomplish more than it possibly can.

- It is important to develop a goal statement in order to define the scope of the project activity.

*Source: CEDPA/Project Design*

# OBJECTIVES

**Definition –** Project objectives are a series of specific accomplishments designed to address the stated problems and attain the stated goal. An objective is an ***endpoint***, not a ***process***. It is a description of what will exist at the end of a project.

The clearer the objectives, the easier it is to plan and implement activities that will lead to attainment of these objectives. Writing clear objectives also makes it easier to monitor progress and evaluate the success of projects.

When writing objectives, avoid "process" words; instead, use "endpoint" words:

| Process Words | Endpoint Words |
|---|---|
| assist | train |
| improve | distribute |
| strengthen | increase |
| promote | reduce |
| coordinate | organize |

Objectives must be ***specific*** (what and when) and ***measurable*** (how much) and must describe what is ***desirable*** (suitable and appropriate for the situation) and ***obtainable*** (realistic).

Checklist:

| | | |
|---|---|---|
| **S** | Specific | Is the objective clear in terms of what, how, when, and where the situation will be changed? |
| **M** | Measurable | Are the targets measurable (e.g., how much of an increase or how many people)? |
| **A** | Area-Specific | Does the objectives delineate an area or population (sex, age, village)? |
| **R** | Realistic | Is the project able to obtain the level of involvement and change reflected in each objective? |
| **T** | Time-Bound | Does the objective reflect a time period in which it will be accomplished (e.g., during the first quarter or mid-point of the project period)? |

*Source: CEDPA/Project Design*

# PROJECT PLANNING

## Activity V - Project Planning (2 hrs):

Each team will develop a draft project plan using the alternative enterprise originally researched by the eight PAAZ team members. Use the "Project Life Cycle" chart and "Stages" as a general outline for your draft project plan. PAAZ members should take a few minutes to explain their initial research to newer team members.
After 5-6 minutes for team presentations the entire group will provide feedback.

# PROJECT REPORTING

## Activity VI – Project Reporting ( 1hr)

A. Review handout "Reporting on Progress" and "When Making Reports"

B. Using the format provided in "Reporting on Progress" create a draft report to USDA-FAS on the alternative agriculture enterprise research project. PAAZ will again take the lead using TOT techniques of "Coaching" & "Case Studies" to involve the newer team members

C. Facilitators will assess each report according to adherence to criteria.

# REPORTING ON PROGRESS

The donor who funds your project will normally require you to submit reports on your progress at various point during project implementation. Reports every four to six months are common. Generally, your grant agreement will outline reporting requirements and provide guidelines related to content and format.

An extremely important point to keep in mind as you report on project progress is that **actual work and achievements must be compared to the planned work and objectives that were stated in your grant agreement**. In this way you will see which activities are progressing on schedule, which are ahead of schedule, and which are behind schedule. This comparison helps you to focus attention both on achievements and on the areas where there are problems to be addressed.

SMART objectives, well planned and scheduled project activities, well chosen indicators of change, and effective, accurate recordkeeping and data collection are key to assuring you will have complete information for reporting on your project's progress.

Although content of a progress report may vary somewhat from one project to another or from one donor to another, your report should be as detailed and specific as possible. In general, the following questions should be answered:

- What is the period covered by the report?
- What were planned targets (objectives) and activities for this period? Your time/task chart will be a valuable reference for answering this question.
- What were the actual achievements and activities for this period and what indicators of change have you used to determine these? Here you will discuss numbers of people involved, what they did or learned, and results.
- What resources were used? Were they adequate? Financial reports should be submitted to account for expenditures made during the same period covered by the progress report. However, don't forget to discuss other resources that have been used, including community participation and any in-kind contributions.
- What lessons have you learned during this time period of project activity and how will this learning be applied to continued project work? Any changes you have made to the project time/task chart will guide you in answering this question.
- What problems did you encounter during this period? How did you or will you solve these problems?
- What are your plans for the next period of project activity? Do these plans involve any changes in the project's objectives, schedule of activities or necessary resources? Again, the time/task chart will be helpful here.

The following steps will guide you in writing your progress reports:

- Review the reporting requirements from your grant agreement.
- Decide what actions, concrete facts, and observable evidence (indicators of change) best document your progress.
- Organize your data and identify gaps that need to be filled.
- Select the most appropriate format for presenting your data.
- Draft your report and ask another knowledgeable person to review it for completeness.

# WHEN MAKING REPORTS

- **Use a variety of formats or methods:** People differ on how they prefer to receive information. Prepare multiple reports using a variety of media.

- **Keep it readable:** Be concise. Including every conceivable piece of information in a report does not impress the reader, it may put them to sleep. Use an appropriate level of detail and include only the most important information. Additional information may be added as an appendix. Use language that is free of technical jargon and easy to understand. Make the report visually appealing. A brief "Executive Summary" might be more useful to those unable to read a full report.

- **Make it credible:** Use examples, anecdotes and illustrations. Do not be afraid to list or identify limitations of your data and provide alternative explanations. This should increase the credibility of your process.

- **Include oral reports in addition to written documents:** Use variety in the format of your oral reports, use multiple media and several presenters. Engage the audience in the presentation by accepting and asking questions and encouraging discussion. Focus on major points rather than on details.

- **Report the most important information:** Report only what is important. Make sure the audience knows how the needs assessment was completed, what is now known that wasn't known before and how the new information will help you reach goals. Help the reader or audience understand how the information is personally relevant.

Source: Adapted from "Building Coalitions," The Ohio Center for Action on Coalition Development, Richard Clark, Ph.D., Director, 1992, The Ohio State University.

**Ways to present reports:**

- Speak at service club meetings, churches, and other places where community leaders may be.
- Arrange personal visit with elected officials or agency heads.
- Send information or news releases tot he local newspaper.
- Coordinate announcements with special events – such as World Food Day.
- Send reports to stakeholders (such as elected officials, non-formal leaders, other agencies that have similar goals and missions).

# PROJECT EVALUATION

## Activity VII – Project Evaluation (10 minutes)

A. Review “Evaluation” handout

B. Optional - Using steps in “Evaluation” handout (What should we evaluate?) prepare an evaluation of your first year in university. Present evaluation to group.

# EVALUATION

What is evaluation?

Evaluation is the process of gathering and analyzing information to determine whether the project is carrying out its planned activities, and the extent to which the project is achieving its stated objectives through these activities.

How does evaluation differ from monitoring?

- timing
- focus
- level of detail

What is the purpose of evaluation?

- to find out how effective the project is
- to see whether objectives have been achieved
- to learn how well things are being done
- to learn from experience so future activities can be improved

When do we evaluate?

- periodically
- mid-term
- at the end of the project (final evaluation)
- several months after a project is underway – after people have had an opportunity to implement and apply what they've learned

Who evaluates?

- internal evaluation can be carried out by the project manager and/or project staff
- external evaluations are carried out by donor(s) or by consultants

What should we evaluate?

- progress in workplan
- establishment of systems
- implementation of planned activities
- achievement of objectives
- effectiveness of project
- impact of project
- efficiency/cost-effectiveness of project

*Source: CEDPA/Project Design*

# INFORMATION SOURCES

## Activity VIII - Information Sources (10 minutes)

After reviewing the Project Life Cycle and completing activities I-VII, list 10 sources of information useful in any aspect of Project Management from inception through evaluation. This is a brainstorming activity for entire group. Record sources on a flip chart and in your notebooks. Post flipchart on wall.

**1.**

**2.**

**3.**

**4.**

**5.**

**6.**

**7.**

**8.**

**9.**

**10.**

# PROPOSAL WRITING

**Overview –** this section focuses on accessing resources needed to carry out projects. The bulk of time will be spent writing and critiquing team proposals. At the conclusion of the workshops the teams should have viable drafts of 4 proposals.

The “Project Proposal” handout will be the chief source for this activity

## Activity 1 – Identifying Funding Opportunities/Sources (10-20 min)

A. In a group brainstorming session, identify as many sources of funding as possible. Try to include one or two keywords to identify the interest area of the funding source.

B. Record on a flipchart and in notebook below. Post flip chart on wall.

# PROJECT FEASIBILITY

## Activity II – Technical and Economic Feasibility (10-20 min)

A. Take 5 minutes to read the following statement. Make notes below then we will evaluate as a group.

1. Caviar is very expensive and therefore a very profitable enterprise. I would like to write a project proposal to start producing caviar in Zambia.

2. Many cities in Europe are demanding cleaner emissions from automobiles. One way to clean up the air is to burn ethanol in autos instead of gasoline. Ethanol is usually made from corn which can be produced in Zambia. I would like to write a project proposal to produce ethanol from Zambian corn and market the ethanol to large European cities in need of cleaner air.

# <u>IDENTIFYING STAKEHOLDERS</u>

## <u>Activity III – Identifying Stakeholders & Garnering Political Support (10-30 min)</u>

A. Group discussion
   1. define in general terms the stakeholders for most ag development projects
   2. why is it necessary to garner political support for your project
   3. what does political support mean

B. Record stakeholders on flip charts and in notebook

# PROJECT PROPOSALS

**Before Writing:**

- Review the mission of the funding organization. Is your proposed project something they are likely to fund?
- Seek commitment from many of the stakeholders in the project. Will they support your project even if it is not funded or are they only interested because some money may be involved?
- Get endorsements from community leaders when appropriate.

**Writing the Proposal:**

- Find out what criteria the funders use for evaluating proposals. Write to that criteria.
- Use language/terminology the reader is familiar with.
- Include:
    1. Overview – A *brief* overview of your project and what you are requesting – money, technical assistance, supplies
    2. Need – What is the problem? How do you know this is a problem? Where did you get the data that supports the need for this?
    3. Description of the project – What are you going to do and how, when and where are you going to do it? How does it meet the need you just described? What is the goal and what are the objectives of the project? What do you hope to accomplish?
    4. Request – What are you asking them to contribute? If it's money, present a budget. How exactly will the money be used? Are you asking for enough funds to adequately complete the project? There should be a clear and explicit link between the budget and the proposed activities.
    5. Feasibility – How do you know this approach will work? Have others tried it? Are you trying to solve too much or make a small but important contribution to a larger problem?
    6. Who – Who will carry out the project? What are their qualifications? If you are working with a committee of diverse persons, tell how you are working together. Funders like to see people cooperating with each other. Demonstrate your qualifications to conduct the project. Tell how your organization/agency has the capacity to carry this out.
    7. Beneficiaries – Who is the intended recipient of the project? How many? Were the people you are trying to help involved in planning the project?
    8. Evaluation plans – How will you know you met your goals? What will the impact of the project be?
    9. Other contributions – What other organizations or individuals are contributing to the project? This can be contributions of supplies, space, expertise, money, training, and other needs of the project. Funders like to know that your group and others are committed to the project.

10. Sustainability. How will the project continue or be maintained after the funding is gone? Will you train people to continue it? Will the project be self-supporting from income it generates? Will the project continue to help people – make an impact – even after it is over?
11. Monitoring and Reporting – How will you monitor the project? How will you tell the funders about the results of your project?

- Include a cover letter that mentions what your proposal is about and who the proposal contact person is.
- Have someone who is not familiar with the project review the proposal before you submit it. Any suggestions? Is it complete, clear and concise?

**Myths about proposal writing:**

1. *Myth:* Proposals are funded by the pound.
   *Fact:* Tell only what you need to. Busy people do not want to have to dig through unnecessary information.

2. *Myth:* You can run a program on grants forever.
   *Fact:* Show how the program will either end or be self-sustaining.

3. *Myth:* You'll impress people by using fancy words.
   *Fact:* Write simply and direct in language the reader will understand

4. *Myth:* Always plead poverty.
   *Fact:* Sponsors will not give you money just because you are poor. They want to fund projects that you convince them will solve or address an important need and that they think are important, too.

5. *Myth:* Planning is a luxury.
   *Fact:* A good plan demonstrates that you have the desire and capacity to carry out a project well.

6. *Myth:* People are just waiting to give us a grant.
   *Fact:* There are many needs and organizations who also want grants. Funders have a responsibility to use their organization's money wisely.

# PROPOSAL WRITING

## Activity IV – Writing the Proposal 1-2 hrs

A. Review the "Project Proposals" handout

B. Read the below "situation" and team write a proposal using points 1-11 in the "Project Proposal" handout as well as other points covered in the workshop. Choose your project based on your specific interest or expertise.

C. Outline proposal on flip chart and in notebook.

D. Use facilitators as needed.

Situation- The minister of Agriculture has issued a RFP for 400 billion Kwacha for agriculturally related development programs. The minister has no preconceived ideas about projects but would like to help as many Zambians as possible. The minister is well aware of world market prices, comparative advantage and the general economic situation in Zambia as well as abroad. Sustainability, ability to be replicated and transparency are other criteria that the minister articulated at the program's announcement.

# NOTES

# NOTES

## **NOTES**

# PROPOSAL REVIEW

## Activity V – Critique Proposal (1 hr)

A. Each team will present proposal with feedback from group and facilitators

B. Record feedback in notebook below.

C. Revise proposal to incorporate feedback

# NOTES

# NOTES

# NOTES

# WRAP-UP & REVIEW

## Activity I

Summarize and post lessons learned

## Activity II

Summarize and post on a flip chart observations and comments about project management, writing proposals, the workshop just completed and other comments.

# TRAINING TECHNIQUES: DEBATE

**DESCRIPTION**

A debate is an activity used to help present varying and often opposite views on a topic, perhaps controversial. Each position is presented and defended by one person or a team of persons.

**USES**

- To synthesize ideas
- To present controversy
- To encourage participants to clarify thoughts and beliefs
- To stimulate higher level learning

**ADVANTAGES**

- Allows learners to take responsibility for their own learning
- Fosters higher level learning
- Is interesting to those viewing the debate
- Allows learners to express and demonstrate personal concerns

**THINGS TO BE AWARE OF BEFORE YOU DECIDE TO USE A DEBATE**

- Viewers of the debate may become passive participants
- Teams may miss important points
- Opinions, rather than facts, may predominate
- Support for a particular point of view may be swayed by personality or presentation skills
- Debate can be difficult for less capable learners
- Summary and discussion must be lead by a skilled facilitator
- Time spent may not be worth the outcome
- Inappropriate when learners function as a support group

**PROCESS**

1. Select a topic appropriate to debate
2. Provide sufficient preparation time
3. Select team members likely to be able to work together
4. Emphasize "roles" being played in the debate
5. Allow each team member to present a position statement
6. Alternate presentations from the two teams
7. Allow a specific period of time for rebuttal by each team
8. Enforce agreed-upon rules of conduct for the debate
9. Summarize
10. Re-emphasize the roles that team members "play" in a debate
11. Debrief and discuss using prepared questions

# TRAINING TECHNIQUES: GAMES

**DESCRIPTION**

Games can be used for many purposes. They are usually fun, sometimes competitive, ways to teach concepts, facts, skills, or values. They may teach implicitly, by providing metaphors for real-life situations. The lesson may also be explicit and known to the learners.

**USES**

- To give learners a break from other types of learning
- To provide a metaphor for or simulation of complex concepts
- Involve many learners at one time, including those of varying skills
- When it is important to teach concepts in several ways

**ADVANTAGES**

- Motivate learners
- Sustain interest
- May encourage retention of material
- Encourage cooperative learning

**THINGS TO BE AWARE OF BEFORE YOU DECIDE TO USE GAMES**

- Competition may discourage less able learners
- Time needed to play the game may not be appropriate in relation to learner outcomes

**PROCESS**

1. Select games according to the desired learning outcomes related to skill, chance, reality, fantasy, or strategy
2. Try the game with people similar to the intended learners
3. Determine how competitors will be chosen/organized
4. Generate back-up material
5. Give full and clear directions of the game – including the objectives and rules
6. Demonstrate if necessary
7. Summarize at the end of the game

# TRAINING TECHNIQUES: PRESENTATION

**DESCRIPTION**
A presentation is an activity conducted by a resource specialist to convey information, theories or principles. Forms of presentations can range from straight lecture to some involvement of the learner through questions and discussion. Presentations depend more on the trainer for content than does any other training technique.

**USES**
- To introduce participants to a new subject
- To provide an overview or a synthesis
- To convey facts, statistics
- To address a large group

**ADVANTAGES**
- Covers a lot of material in a short time
- Useful for large groups
- Can be adapted to any kind of learner
- Can precede more practical training techniques
- The lecturer has more control than in other situations

**THINGS TO BE AWARE OF BEFORE YOU DECIDE TO USE A PRESENTATION**
- Emphasizes one-way communication
- Is not experiential in approach
- Learner's role is passive
- Lecturer needs skills to be an effective presenter
- Inappropriate for changing behavior or for learning skills
- Learner retention is not as great unless it is followed up with a more practical technique
- A presentation is common in more formal settings.

**PROCESS**
1. Introduce the topic – tell the learners what you're going to tell them.
2. Tell them what you want to tell them -- present the material using visual aids
3. Summarize they key points you've made – tell the learners what you've told them.
4. Invite the learners to ask questions.

*Source: CEDPA/Training Trainers*

# TRAINING TECHNIQUES: DEMONSTRATION

**DESCRIPTION**
A demonstration is a presentation of a method of doing something.

**USES**
- To teach a specific skill or technique
- To model a step-by-step approach

**ADVANTAGES**
- Easy to focus learner's attention
- Shows practical applications of a method
- Involves learners when they try the method themselves

**THINGS TO BE AWARE OF BEFORE YOU DECIDE TO USE A DEMONSTRATION**
- Requires planning and practice ahead of time
- Demonstrator needs to have enough materials for everyone to try the method
- Not useful in large groups
- Requires giving feedback to learners when they try themselves

**PROCESS**
1. Introduce the demonstration -- what is the purpose?
2. Present the material you're going to use.
3. Demonstrate
4. Demonstrate again, explaining each step.
5. Invite the learners to ask questions
6. Have the learners practice themselves
7. Discuss how easy/difficult it was for them – summarize

*Source: CEDPA/Training Trainers*

# TRAINING TECHNIQUES: CASE STUDY

**DESCRIPTION**
A case study is a written description of a hypothetical situation that is used for analysis and discussion.

**USES**
- To discuss common problems in a typical situation
- Provides a safe opportunity to develop problem-solving skills
- To promote group discussion and group problem-solving

**ADVANTAGES**
- Learner can relate to the situation
- Involves and element of mystery
- The hypothetical situation does not involve personal risks
- Learners are involved

**THINGS TO BE AWARE OF BEFORE YOU DECIDE TO USE A CASE STUDY**
- The case must be closely related to the learners - experience
- Problems are often complex and multi-faceted
- There is not always just one right solution
- Requires a lot of planning time if you need to write the case yourself
- Discussion questions need to be carefully designed

**PROCESS**
1. Introduce the case
2. Give learners time to familiarize themselves with the case
3. Present questions for discussion or the problem to be solved
4. Give learners time to solve the problem/s
5. Have some learners present their solutions/answers
6. Discuss all possible solutions/answers
7. Ask the learners what they have learned from the exercise
8. Ask them how the case might be relevant to their own environments
9. Summarize

*Source: CEDPA/Training Trainers*

# TRAINING TECHNIQUES: ROLE PLAY

**DESCRIPTION**

In a role play, two or more individuals enact parts in a scenario related to a training topic

**USES**

- Helps to change people's attitudes
- Enables people to see the consequences of their actions on others
- Provides an opportunity for learners to see how others might feel/behave in a given situation
- Provides a safe environment in which participants can explore problems the may feel uncomfortable about discussion in real life
- Enables learners to explore alternative approaches to dealing with situations

**ADVANTAGES**

- Stimulating and fun
- Engages the group's attention
- Simulates the real world

**THINGS TO BE AWARE OF BEFORE YOU DECIDE TO USE A ROLE PLAY**

- A role play is spontaneous -- there is no script to follow
- Actors must have a good understanding of their role for the role play to succeed
- Actors might get carried away with their roles

**PROCESS**

1. Prepare the actors so they understand their roles and the situation.
2. Set the climate so the observers know what the situation involves
3. Observe the role play
4. Thank the actors and ask them how they feel about the role play – be sure that they get out of their roles and back to their real selves
5. Share the reactions and observations of the observers
6. Discuss different reactions to what happened
7. Ask the learners what they have learned and develop principles
8. Ask the learners how the situation relates to their own lives
9. Summarize

*Source: CEDPA/Training Trainers*

# TRAINING TECHNIQUES: SIMULATION

**DESCRIPTION**
A simulation is an enactment of a real-life situation.

**USES**
- Allows learners to experience decision-making in "real" situations without worrying about the consequences of their decisions.
- A way to apply knowledge, develop skills, and examine attitudes in the context of an everyday situation

**ADVANTAGES**
- Practical
- Learners are able to discover and react on their own
- High involvement of the learner
- Immediate feedback

**THINGS TO BE AWARE OF BEFORE YOU DECIDE TO USE A SIMULATION**
- Time-consuming
- The facilitator must be well-prepared, especially with logistics
- A simulation is often a simplistic view of reality

**PROCESS**
1. Prepare the learners to take on specific roles during the simulation
2. Introduce the goals, rules, and time frame for the simulation
3. Facilitate the simulation
4. Ask learners about their reactions to the simulation
5. Ask learners what they have learned from the simulation and develop principles
6. Ask learners how the simulation related to their own lives
7. Summarize

*Source: CEDPA/Training Trainers*

## TRAINING TECHNIQUES: SMALL GROUP DISCUSSION

**DESCRIPTION**
A small group discussion is an activity that allows learners to share their experiences and ideas or to solve a problem.

**USES**
- Enhances problem-solving skills
- Helps participants learn from each other
- Gives participants a greater sense of responsibility in the learning process
- Promotes team work
- Clarifies personal values

**ADVANTAGES**
- Learners develop greater control over their learning
- Participation is encouraged
- Allows for reinforcement and clarification of lesson through discussion

**THINGS TO BE AWARE OF BEFORE YOU DECIDE TO USE A SMALL GROUP DISCUSSION**
- The task given to the group needs to be very clear
- The group should be aware of time limits for the discussion
- Participants should be able to listen to each other, even if they don't agree
- Group discussion should not be dominated by any one or two people
- Questions help guide the discussion
- Everyone should be encouraged to participate

**PROCESS**
1. Arrange the learners in groups of four to seven
2. Introduce the task that describes what should be discussed
3. Ask each group to designate a discussion facilitator, a recorder, and a person to present the group's findings to the larger group
4. Check to make sure that each group understands the task
5. Give groups time to discuss -- This should not require the trainer's involvement unless the learners have questions for the trainer
6. Have one person form each group summarize the findings of the group (This could be a solution to a problem, answers to a question, or a summary of ideas.)
7. Identify common themes that were apparent in the groups? presentations
8. Ask the learners what they have learned from the exercise
9. Ask them how they might use what they have learned

*Source: CEDPA/Training Trainers*

## TRAINING TECHNIQUES: COACHING

**DESCRIPTION**
Coaching is providing directions and ongoing encouragement and feedback – usually on an individual or small group (team) basis.

**USES**
- To teach a specific skill or technique
- To provide individual guidance

**ADVANTAGES**
- Can be used to teach new behavior or correct inappropriate behavior
- Involves immediate feedback and evaluation
- Easy to focus the learner's attention
- Shows application of knowledge or skills

**THINGS TO BE AWARE OF BEFORE YOU DECIDE TO USE COACHING**
- Requires that the coach be proficient in the concept being taught
- Requires accurate estimation of the learner's skills
- Focus must be on the learner rather than the teacher

**PROCESS**
1. Review the skill yourself
2. Match directions to the maturity and skills of the learner
3. Set realistic time expectations
4. Reward lavishly – provide ongoing feedback and encouragement

# TRAINING TECHNIQUES: FIELD TRIPS/TOURS

**DESCRIPTION**
A field trip or tour allows learners to see actual programs or projects in their context.

**USES**
- Exchange ideas with other communities or with persons carrying out similar projects
- To introduce learners to new and innovative programs
- To observe or evaluate programs
- To reward participants

**ADVANTAGES**
- Easier to explain new concepts when they can be observed
- Involves all of the senses for greater retention of new knowledge and skills

**THINGS TO BE AWARE OF BEFORE YOU DECIDE TO USE A FIELD TRIP**
- Can be expensive and time consuming
- Requires preparation of participants and speakers
- Requires follow-up discussion and interpretation of experience

**PROCESS**
1. Select an affordable site or experience
2. Plan and confirm details and delegate tasks (speakers, transportation, meals)
3. Convey learner needs, background and expectations to the speakers
4. Discuss objectives for the trip prior to the trip
5. Collect questions and expectations learners want answered
6. Provide guidelines or worksheets for observations and completion during the trip.
7. Review what was learned after the trip.

# TRAINING TECHNIQUES: FORUM

**DESCRIPTION**
A forum is a 15-60 minute period of open discussion carried on among the members of an entire group. It usually involves one or more resource persons. A moderator directs the discussion between the resource person and the audience.

**USES**
- To ask questions
- To raise issues
- To propose solutions
- To encourage discussion after a presentation by resource person(s)

**ADVANTAGES**
- Clarifies or explores issues raised or information presented
- Encourages higher level thinking through interaction with and challenging of resource persons
- Enables audience to contribute ideas and opinions
- Allows persons with controversial ideas an opportunity to be heard
- Can conduct a more thorough discussion than a question and answer period permits

**THINGS TO BE AWARE OF BEFORE YOU DECIDE TO USE A FORUM**
- Requires skilled moderator
- Audience must be aware of the process (e.g., when questions will be answered)
- Works well for large groups but may be frustrating if many persons want to ask questions

**PROCESS**
1. Prepare resource person(s) (if part of forum)
2. Review process for the audience
3. Set time limits and policies to enable good exchange
4. Respect each person's opinion and comments
5. Make sure all sides have an opportunity to speak
6. Identify needs and interests to be met by further programming

# TRAINING TECHNIQUES: DRAMATIZATION

**DESCRIPTION**
A dramatization is a combination of the discussion and demonstration methods. Actors take on the role of characters to explain situations and their potential outcomes.

**USES**
- Illustrate attitudes, behaviors, and consequences
- Show group how to perform a procedure or technique or how to apply a particular skill

**ADVANTAGES**
- Increases group participation
- Informs and entertains at the same time
- Good attention-getter
- Is appropriate and common in many cultures
- Can be used with learners with low literacy skills

**THINGS TO BE AWARE OF BEFORE YOUR DECIDE TO USE A DRAMATIZATION**
- Actors must be familiar with the intended lesson or outcome
- Audience and players may focus more on acting than on the learning objectives behind the dramatization
- Can take preparation time
- Needs a skilled facilitator to prepare and debrief audience

**PROCESS**
1. Become familiar with the technique or skill being portrayed
2. Ask for volunteers to act out the roles
3. Prepare the actors for their roles. Give them time to think through and discuss how they will act out their roles.
4. Prepare the audience for what they will see and how they might respond
5. Stop the dramatization when significant points have been made so that the audience can respond.
6. Conduct a post-dramatization discussion.

# TRAINING TECHNIQUES: MENTORING

**DESCRIPTION**
Mentoring is an ongoing process of variable length designed to help guide and nurture the growth and development of an individual. The mentor teaches by informally guiding and counseling an individual.

**USES**
- Provides direction and assistance to someone with limited role-models
- Develops self-esteem and confidence in the person being mentored
- Reinforces and applies knowledge and attitudes learned in group or more conventional learning situations.

**ADVANTAGES**
- Is tailored to when, what, how and where the learner needs assistance
- Respects the individual
- Is ongoing

**THINGS TO BE AWARE OF BEFORE YOU DECIDE TO USE MENTORING**
- Places responsibility on the mentor as well as the learner
- Requires great deal of trust, support, care, empathy, and ethics of the mentor
- Can take a lot of time and emotional energy

**PROCESS**
1. Make a comfortable match between the learner and mentor
2. Set realistic expectations of the relationship and clear, mutually determined goals
3. Meet in an ongoing basis. Frequency may vary according to the learner's needs
4. Provide positive feedback and mutual rewards

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