



Guidelines for Trainers

Module 5: Planning, Organization, and Evaluation in Adult Education

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Introduction

Curriculum globALE (CG) is a cross-cultural core curriculum for the training of adult educators worldwide. It was developed jointly by the German Institute for Adult Education (DIE) and DVV International, the Institute for International Cooperation of the German Adult Education Association. In five modules, it describes the relevant skills needed to lead successful courses and provides guidance on their practical implementation.

This guideline covers the 5th module of Curriculum globALE and offers a blue print to do a four-day training course on methods in adult education including a self-learning phase. The module covers a range of processes that are not part of the direct interaction between trainer and participants but contribute to the overall quality of measures of adult education in the background of the actual learning process. *Quality* is used as an overarching concept in which the analysis of needs, planning and organizing as well as monitoring and evaluation are introduced in order to support the participants of Curriculum globALE to achieve the best learning results for their beneficiaries.

The guidelines cover

- An overview on lessons and their linkage to Curriculum globALE
- Recommendations for assessment of learning achievements
- An introduction to the concepts of quality, the planning cycle and its contents:
 - Needs assessments
 - Planning and organizing
 - Monitoring and evaluation
- A detailed training plan
- Sources

The author wishes everyone using this module great success and all the best for the training

Note on Language

There is quite a risk of language confusion if it comes to the project cycle. Many authors develop his or her own terminology for the steps to be taken, so misunderstandings and discussions on 'what is understood by planning' are pretty much predetermined. The Trainer should be aware of this and try to steer the discussions towards the actual content of the concepts and away from definitions.

In this module the term impact chain will be used for the line of events leading from an input to activity and is then transferred onwards to results on community and society level, while a logical framework describes the same model but with a fixed terminology and a more elaborated set of criteria.

Another point of clarification lies in the hierarchy of Aims, Goals, and Objectives, the general use in the education sector is to understand

Aims as the most general desired outcome and are almost at the level of a principle. They cannot be measured and their achievement will highly be total, e.g. equal access to education

Goals as the intermediate level between aims and objectives, goals guide policies and determine what achievement a training or curriculum contributes to, e.g. full literacy for all adults.

Objectives as the direct description of what should be attained, e.g. 90% of participants possess the skills to fix a broken tire of a bicycle after the training

- Noddings, Nel: **Aims; Goals and Objectives**,
ojs.library.queensu.ca/index.php/encounters/article/viewFile/571/751
- Ritz, John: **Notetaking guides: aims, goals and objectives**,
<http://ww2.odu.edu/~jritz/oted885/ntg9.shtml>

The use of such terminology gets further complicated as there is no 'fixed line' between the levels of desired attainment and aims, goals, and objectives are frequently accompanied by the 'general' and 'specific' variety of themselves which further complicates the matter. Within this manual the hierarchy above will be used and only objectives will be broken down on different levels.

The issue is further exasperated by the use of terminology in formulating logical frameworks, e.g. in the use of outcome and output in logical frameworks. In everyday language people will refer to an outcome of a process rather than an output, while in the terminology used at logical frameworks (see Session Ten the terminology is reversed, a measure leads to outputs which later on are (or should be) transformed into outcomes. Also if it comes to logical frameworks various sometimes interchangeable other terms are used by different actors, e.g. results, purpose, utilization of outcomes.

This holds also true for methods described, as laid down in more detail at the 4th Module on Methods in Adult Education, they are known under different names in different languages and sometimes the same name (e.g. *fishbowl*) covers in fact a family of quite diverse methods. Hence, methods need to be looked at in detail to know how they can actually be used and what can be achieved by using them.

Note on Terminology used:

Capitals indicate a specific person, role or method, while small letters indicate the general group, e.g. the Trainer is the person conducting the Module, and trainers are the general group. The Participants in this context are the ones taking part in the training, while participants are the generalized group.

Please note that while the Curriculum globALE refers to instructional hours this module uses the word lessons instead, while two lessons form a session.

Note on Formatting

All sessions follow the same structure of description:

Normal text is the introduction on what the session is about

Boxed text gives a description of the background of the respective subject
--

- Bullet Arrow indicates links to websites related to the topic

Text in Italics refers to tips and tricks as well as comments on facilitation

- Bullet Points indicate each step of the session (either change of method or different phase of the same)

Please note that not all sessions feature background information and comments

Note on Quotes

All sources used for this module are available online and have been visited by December 28th 2016. In order to have a uniform way of quoting while featuring a large number of documents which do not match the 'traditional way' citing location and date of publication the latter two are excluded when listing sources.

About this module

Even though this module offers a detailed training plan, it is not, however, designed to be used without adjustment – which would also contradict the principles, which will be described later on. The training was designed for an 'ideal' training venue with essentially all kinds of devices available and a group of experienced and 'open' trainers. In addition, the choice of methods reflects the preferences of the author to some extent which do not necessarily need to be the ones of the Trainer conducting it.

When planning for this training to take place, these issues need to be taken into consideration and the program needs to be adjusted accordingly in order to enable the participants to benefit most from it.

It needs to be noted, that some tasks are deliberately vague (such as in the role-play or during facilitation) in order to challenge the participants to use their intellect to understand how methods work.

The training course consists of four phases and an equal number of self-learning phases:

- Preparation by Participants: Quality in Adult Education
- Training Day One: Introducing the concept of Quality, introduction to the project planning cycle, needs assessments for organizations
- Preparation by Participants: Individual needs assessments: The ProfilPASS
- Training Day Two: Individual and community needs assessments, stakeholder analysis, Problem / Solution Tree
- Preparation by Participants: Learning Outcomes
- Training Day Three: Phase model, logical framework, operational planning
- Preparation by Participants: Monitoring & Evaluation
- Training Day Four: SMART-Objectives, methods of monitoring and their application, referencing to Quality

The Module uses the self-studying phases to enable the Participants to get familiar with the background concepts and apply them to their respective working environment while the training days are used to discuss and ensure proper understanding.

As this module features some templates and graphs but does not feature a reader, the Trainer may have a documentation of the course produced which can also be used for grading

Areas of Curriculum globALE, Workload and Sessions

Area	General Timeframe	Count	Contents	Time
2d	30%	Reading Exercise: 4 lessons	Preparation Quality	Preparation Day 1
		Sessions One and Two: 4 lessons	Quality in Adult Education	Day 1
1	4%	Session Three: 2 lessons	Project Planning Cycle	
2a	24%	Session Four: 2 lessons	SWOT Analysis	
		Reading Exercise: 8 lessons Practical application: 12 lessons	ProfilPASS	Preparation Day 2
		Sessions Five to Seven: 6 lessons	Individual Needs Assessment, Community Needs Assessment, Stakeholder Analysis	Day 2
2b	24%	Session Eight 2 lessons	Problem/Solution Tree	
		Reading Exercise: 6 lessons Practical Application: 8 lessons	Reading on the formulation of Learning Outcomes Preparation of an individual problem/solution tree	Preparation Day 3
		Session Nine to Eleven 6 lessons	Phase model, logical framework	Day 3
2c	18%	Session Twelve: 2 lessons	Operational planning	
2d	30%	Reading Exercise: 14 lessons	Reading on Evaluation	Preparation Day 4
		Session Thirteen to Sixteen 8 lessons	SMART Objectives, Methods of Monitoring and Feedback, Reflection on quality	Day 4

Additional: 30 lessons: practical application for creation of a logical framework and a monitoring plan,
24 lessons for preparing group presentation

The training program does not entirely match the requirements of the quality control as their requirements can hardly be fulfilled in the timeframe given. The count of the areas to be covered is:

Area	Planned percentage of total	Actual lessons	Percentage training time + self-study	Percentage training time
1	4%	2 lessons	3%	6%
2a	24%	16 lessons	25%	25%
2b	24%	14 lessons	22%	25%
2c	18%	2 lessons	3%	6%
2d	32%	30 lessons	47%	38%
Total	100%	64 lessons	100%	100%

The module focuses on a group of Participants, which has already gathered some experience in holding trainings and is familiar with the organizational environment they are operating in. In case of less experienced Participants (e.g. students) other means to ensure they have background knowledge need to be employed, e.g. mandatory internships or learning pairs with mentors/more experienced Participants.

The size of the group is assumed to be 18 Participants, if more or less people take part, the sizes/numbers of groups needs to be adjusted accordingly.

Assessment and Grading

The performance of the Participants will be checked upon using three methodologies:

Group work presentation

All Participants should take part in the preparation of one element of the project planning cycle, the presentation should not be graded but only used to safeguard one subject has been studied in depth.

Sessions shall be held by pairs of Participants and are available for:

- Quality in Adult Education: Onion Modell (Session Two)
- Project Planning Cycle (Session Three)
- Needs Assessment: SWOT Analysis (Session Four)
- Needs Assessment: Gap Analysis (Session Five)
- Needs Assessment: Scoring (Session Six)
- From Needs to Plans: Problem/Solution Tree (Session Eight)
- Planning and Organizing: Phase Modell (Session Nine)
- Planning and Organizing: Logical Framework (Session Ten)
- From Planning to Monitoring: SMART Objectives (Session Thirteen)

The inputs need to be closely coordinated with the Trainer in order to avoid different terminology, etc. The first three sessions need to be agreed upon before the course starts so Participants have time to prepare. The first three sessions need to be agreed upon beforehand so the Participants are able to prepare in time.

Please note that some of the inputs replace video screenings and may alter the time-frame.

Practical assignment

In between training days, Participants get assignments similar to homework applying some of the concepts used to their own situation. These might be used for grading but Participants have to be aware of the expected level of performance (e.g. how many pages should be produced).

Example of Application

After the Module the participants should be able to design a training, workshop, or course using logical frameworks, timetables, and checklists. They can be asked to develop a concept for one of their activities using the tools they learnt. These might be gridded against coherence of the concept, adherence to standards taught (e.g. SMART objectives), feasibility of the concept.

Participants should receive their certificate if they have thus demonstrated, that

- they are familiar with the concept of Quality in Adult Education and are able to apply it in practical terms when planning an educational measure
- accustomed with the phases of the project planning cycle and its application
- able to plan, reflect on and apply methods
 - of assessing needs for individuals, organizations, and communities
 - to formulate educational objectives and putting these in a framework
 - enabling a smooth operation of educational measures
 - of monitoring educational measures' success and adjust further proceeds accordingly
- they are able to apply the activities stated above and document these in a coherent educational project

Introduction to Planning Organization and Evaluation in Adult Education

Along the sequence of the training the following pages will start with quality in adult education as the starting point and a reference for the introduction of the other concepts mentioned later on.

Quality

Quality Education (at least verbally) is still high on the political agenda, the [European] Council Resolution on a renewed European agenda for adult learning lists as priorities for the period 2015 - 2020:

2. Improving the quality and efficiency of education and training

In order to build a strong adult-learning sector, Member States are invited to focus on:

- *Developing quality assurance for adult-learning providers, for example by means of accreditation systems, taking into account already existing quality frameworks/standards in other sectors.*
- *Improving the quality of adult education staff, for instance by defining competence profiles, establishing effective systems for initial training and professional development, and facilitating the mobility of teachers, trainers and other adult education staff.*
- *Ensuring a viable and transparent system for the funding of adult learning, based on shared responsibility with a high level of public commitment to the sector and support for those who cannot pay, balanced distribution of funds across the lifelong-learning continuum, appropriate contribution to funding from all stakeholders and the exploration of innovative means for more effective and efficient financing.*
- *Developing mechanisms for ensuring that educational provision better reflects labour market needs and that it provides possibilities for acquiring qualifications and developing new skills which increase people's capacity to adapt to the new requirements of a changing environment.*
- *Intensifying cooperation and partnership between all stakeholders relevant for adult learning, notably public authorities, the different providers of adult-learning opportunities, social partners and civil society organisations, especially at regional and local level in the context of developing 'learning regions' and local learning centres.*

➔ Council of the **European Union: Council Resolution on a renewed European agenda for adult learning**, 2011/C 372/01, http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.C_.2011.372.01.0001.01.ENG

As the large variety of goals indicates, quality is a complex concept which may encompass elements on all levels. The original word quality comes from the Latin *qualitas*: condition, characteristic, state and was originally applied to products: A car, TV-set or dishwasher that serves its owner well is still deemed 'high quality'. In other words, quality describes the relation between the expectations of the various stakeholders and the product or service's actual performance.

In Education where achievements are not quite as tangible the concept of quality became very popular in the 1990ies and 2000s but somehow lost some of its attention in recent

times. Still it serves as a good reference as to what good planning, organizing and monitoring and evaluation are all about.

Quality control in form of a final check of the product is known in industrial production for a long time and evolved into more and more sophisticated systems of intermediate steps of evaluation since the turn of the last century. Similar concepts are known from education: From vocational training, where apprentices and masters have to prove their skills by making a masterpiece as well as in general and academic education where exams and theses (should) make sure that a certain standard of education is attained.

The concept of quality after the second World War developed into two distinct directions (without neglecting the methods stated above): On the one hand cultural aspects of quality attained in products and services were elaborated, such as in the concept of Kaizen:

Kaizen is the practice of continuous improvement. Kaizen was originally introduced to the West by Masaaki Imai in his book Kaizen: The Key to Japan's Competitive Success in 1986. Today Kaizen is recognized worldwide as an important pillar of an organization's long-term competitive strategy. Kaizen is continuous improvement that is based on certain guiding principles:

- *Good processes bring good results*
- *Go see for yourself to grasp the current situation*
- *Speak with data, manage by facts*
- *Take action to contain and correct root causes of problems*
- *Work as a team*
- *Kaizen is everybody's business*
- ➔ **Kaizen Institute: What is Kaizen**, <https://www.kaizen.com/about-us/definition-of-kaizen.html>

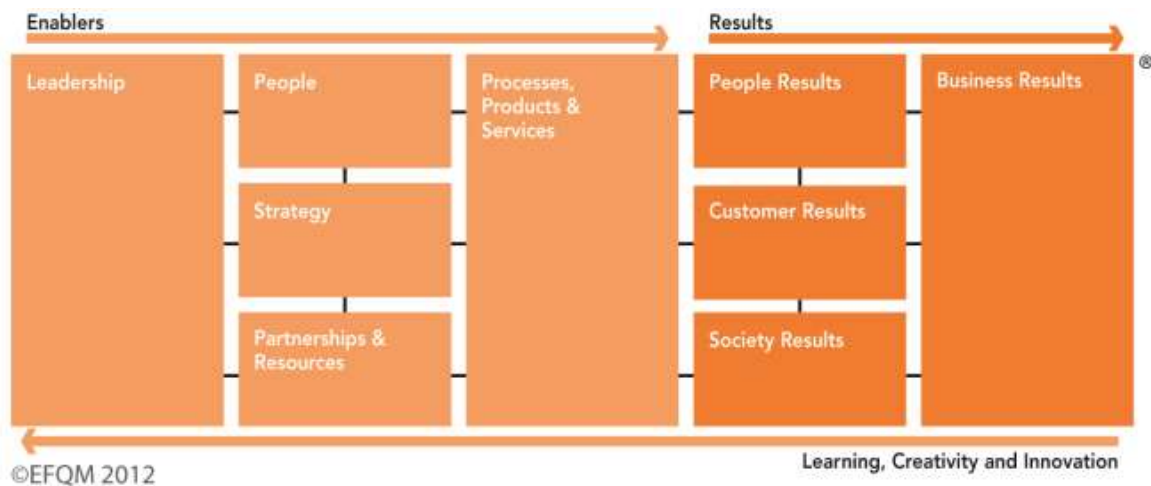
The main focus is the individual strive to create the best quality possible.

In parallel concepts of process oriented quality management were developed, following the basic idea that if the processes leading to a product or service are sound, the product itself will necessarily be of good quality, too. The best known example is the DIN ISO 9000ff. family of standards which describes the respective standards of various processes within each organization in order to achieve the best quality:

Consistent and predictable results are achieved more effectively and efficiently when activities are understood and managed as interrelated processes that function as a coherent system.

- ➔ **International Organization for Standardization (ISO): Quality management principles**, <http://www.iso.org/iso/pub100080.pdf>.

In recent times all three approaches (Frequent checks of the product/service, the philosophy of improving, and process orientation) have been fused, e.g. in the well-known system of the European Federation of Quality Management which looks at 'Enablers' (=processes) and 'Results' using a scoring system:



- ➔ European Foundation for Quality Management, EFQM: An **Overview of the EFQM Excellence Modell**, http://www.efqm.org/sites/default/files/overview_efqm_2013_v1.1.pdf

It needs to be noted though that blending these different philosophies is not without difficulties, common issues stated are that e.g. that while the idea of Kaizen focuses on the individual responsibility of each member of an organization, processes are devices to regulate human behavior and have the tendency to stifle individual commitment (in other words 'why should I worry about the results if I am told what to do by a process I had no hand in creating at the first place').

These concepts have also been adapted to the sphere of adult education and some countries require accreditation in order to access government funds or encourage the development of overarching systems.

- ➔ Ö-CERT [AT-Cert], **An overall framework of quality for Adult Education in Austria**, https://oe-cert.at/media/OE-Cert_abstract.pdf?m=1478684822

Even though quality may sound like an abstract concept if it comes to the work of an adult educator, it provides a valuable focus to analyze how society and the institutional environment influence the outcome of learning endeavors. Standards set for trainings by the government and provisions of the respective training provider influence what achievements are possible and which are not – practically if there are no funds for heating the classroom in winter, the trainer will feel an impact quite directly.

As a last note quality is always a relative term and should not be confused with perfection. The quality attained during a training is to a certain extent the result of conscious decision how much time and money should be invested. Usually the 'ideal size' of a learning group is twelve members (because you can form six pairs, four groups of three, three groups of four and two groups of six) but the actual size of the group of participants is often higher or lower (like in the training proposed in this manual). Lack of time and resources will in most cases prevent the ideal situation for the respective training or workshop, so trainers should be aware on how the different processes involved influence their working environment and how that their job is to deliver the best quality possible under the given circumstances.

- ➔ Allais, Stephanie Matselling: **Quality Assurance in Education**, <http://vodppl.upm.edu.my/uploads/docs/QA%20in%20education2009.pdf>
- ➔ Broek, Simon; Buiskool, Bert-Jan, **Developing the adult learning sector, Quality in the Adult Learning Sector**, Final report, https://oe-cert.at/media/Enquete2016/Study_quality_Broek_Buiskol_2013.pdf

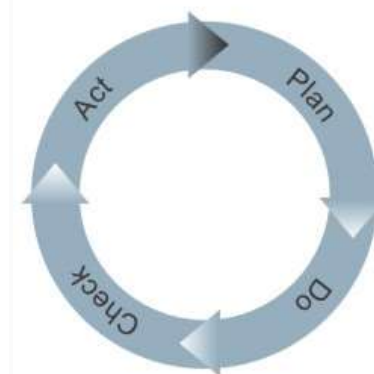
- ➔ European Foundation for Quality Management, **EFQM: An Overview of the EFQM Excellence Modell**, http://www.efqm.org/sites/default/files/overview_efqm_2013_v1.1.pdf
- ➔ Hilbig, Lisa; Thom, Sabrina; Tursi, Silvia, **Comparing Quality Management Systems and procedures in Italy and Germany**, in Egetenmeyer, Regina, Adult Education and Lifelong Learning in Europe and Beyond, <https://www.peterlang.com/downloadpdf/9783653059731/9783653059731.00008.xml>
- ➔ International Organization for Standardization (ISO): **Quality management principles**, <http://www.iso.org/iso/pub100080.pdf>. Ö-CERT [AT-Cert], **An overall framework of quality for Adult Education in Austria**, https://oe-cert.at/media/OE-Cert_abstract.pdf?m=1478684822
- ➔ Quality Assurance for Higher Education Institutions' Continuing Education Programmes (QACEP): **Quality Assurance for Continuing Education Programmes: A handbook for Higher Education Institutions**, https://www.qacep.eu/PublicDeliverables/QACEP_Handbook_web%20version.pdf

The Planning Cycle in Adult Education

Planning cycles are a standard procedure for continuous improvement and can be applied for projects, programs or organizations. The basic form is the PDCA (Plan, Do, Check, Act) – cycle which describes the stages

- Plan:** Identifying and analyzing the problem.
- Do:** Developing and testing a potential solution.
- Check:** Measuring how effective the test solution was, and analyzing whether it could be improved in any way.
- Act:** Implementing the improved solution fully.

Figure 1: The Plan-Do-Check-Act Cycle



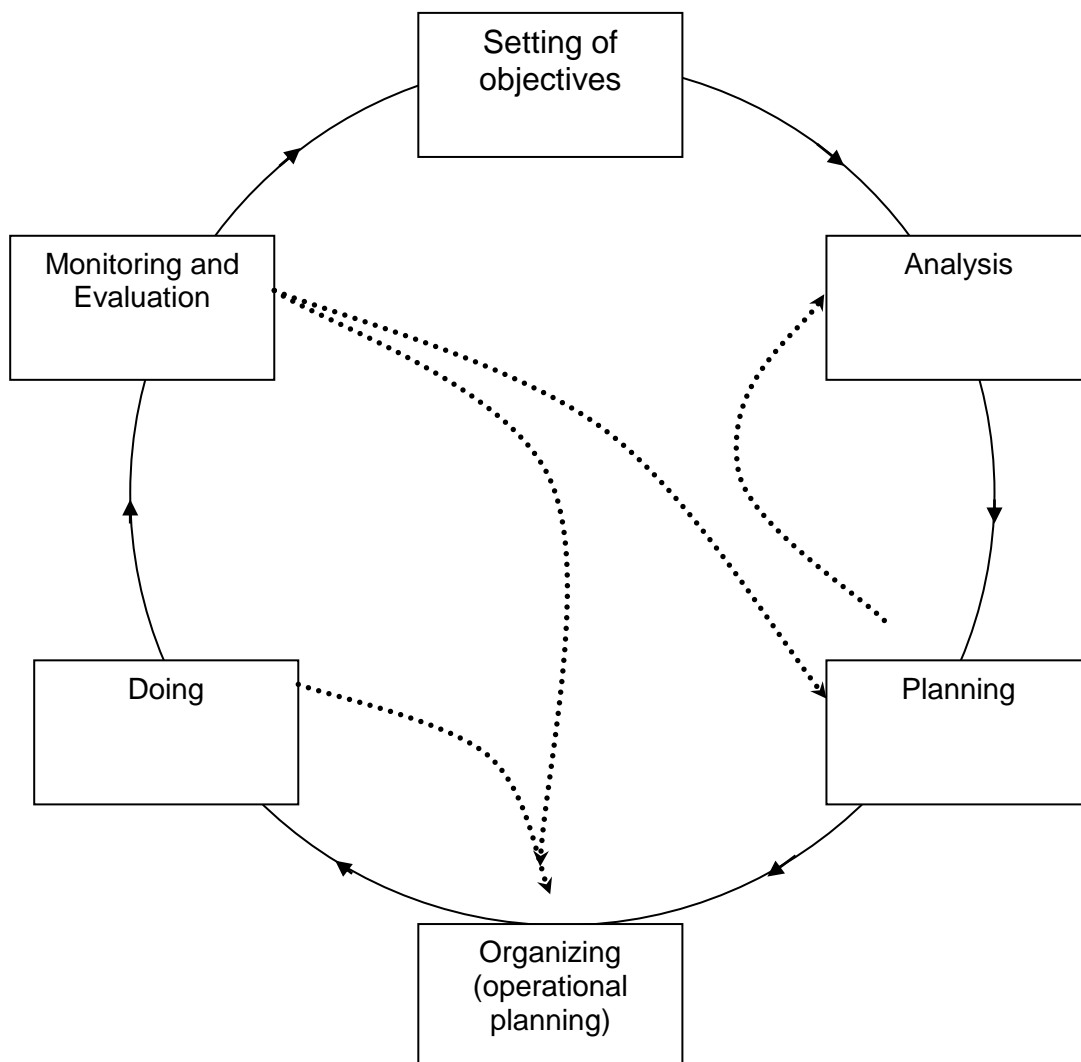
- ➔ The Mind Tools Editorial Team: **Plan-Do-Check-Act (PDCA) Implementing New Ideas in a Controlled Way**: https://www.mindtools.com/pages/article/newPPM_89.htm

By restarting the cycle again projects, programs or organizations can continuously improve their performance.

The basic cycle has been improved and further differentiated to fit its various uses (usually the sequence of having a 'test run' before the big roll-out is dropped in favor of continuous adjustment e.g. when using cycles for strategic planning). This also holds true for Education which features a plethora of different cycles (some are even square):

	<table border="1"> <thead> <tr> <th>QUESTIONS</th> <th>PLANNING STAGES AND ACTIVITIES</th> </tr> </thead> <tbody> <tr> <td>Where do we stand today?</td> <td>Diagnose: analyzing the current situation in the sector and its environment</td> </tr> <tr> <td>Where would we like to be in the future? Which directions should we adopt?</td> <td>Policy formulation: choice of goals and strategies</td> </tr> <tr> <td>How can we get there? At what cost? Through which specific measures? Also: what do we get there?</td> <td>Planning targets and plan operationalisation: defining precise objectives and the means and means of obtaining them</td> </tr> <tr> <td>Are we moving in the right direction? Which adjustments are needed?</td> <td>Monitoring, measuring and evaluating progress and taking corrective action</td> </tr> </tbody> </table>	QUESTIONS	PLANNING STAGES AND ACTIVITIES	Where do we stand today?	Diagnose: analyzing the current situation in the sector and its environment	Where would we like to be in the future? Which directions should we adopt?	Policy formulation: choice of goals and strategies	How can we get there? At what cost? Through which specific measures? Also: what do we get there?	Planning targets and plan operationalisation: defining precise objectives and the means and means of obtaining them	Are we moving in the right direction? Which adjustments are needed?	Monitoring, measuring and evaluating progress and taking corrective action	
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<p>↻ Gwang-Chol Chang: Strategic Planning in Education: Some Concepts and Steps, http://unesdoc.unesco.org/images/0015/001501/150191e.pdf</p>	<p>↻ UNESCO Institute for Educational Planning: Educational Planning, approaches, challenges and international frameworks, Distance Education Programme on Education Sector Planning, http://www.unesco.org/new/fileadmin/MULTIMEDIA/FIELD/Beirut/images/Training_Module_1_on_Educational_Planning_En g.pdf</p>	<p>↻ Forest, Ed: The ADDIE Model: Instructional Design, http://educationaltechnology.net/the-addie-model-instructional-design/</p>										

For the Curriculum globALE a cycle consisting of six stages (and some minor cycles) is recommended:



The stages are:

Setting of objectives¹: This process consists of two decisions:

1: What is analyzed, what issue should be addressed, e.g. skills development of school drop-outs, female literacy, political education for juvenile delinquents...

2: What should be achieved, what changes are desired

Usually goal setting happens on a management level, e.g. decreed by the Minister of Education or the Board of a NGO.

Analysis: At this stage the needs of the sector, group, organization is assessed, various ways to do this will be introduced on the next page and during sessions four to seven

Planning: This stage refers to the general planning, e.g. development of a curriculum and an impact chain (see phase model at session nine). At this level often another small cycle is needed. Often the original analysis is not detailed enough to have a sound planning process and requires additional research and background information

Organizing (operational planning): Here the course program is developed in detail, e.g. in terms of timing, resources needed, this will be dealt with in detail at session twelve

Doing: The actual course/training takes place, as the elements of the doing are covered in modules 2-4 this element will not be dealt with in this module. Another small cycle happens here – usually the fine-tuning of a training happens on the spot and trainers will adjust their sessions on an ongoing basis

Monitoring and Evaluation: Monitoring covers the ongoing methodic tracking of the developments within the learning group in order to adjust the training or course, hence its findings are directly feedback to general and operational planning. Ideally monitoring is integral part of 'planning and doing' (and not the odd questionnaire everyone is annoyed about at the end of the training).

Evaluation is usually conducted by the end or after reaching a milestone of a project (course, programmer...) in order to document achievements and draw lessons learnt – usually evaluation is done externally and covers a wide range of methods. Details on monitoring and evaluation will be elaborated at day for in sessions thirteen to sixteen

- ➞ Action for the Rights of Children: **Facilitator's Toolkit**:
<http://www.unhcr.org/4371d7c92.pdf>
- ➞ Caffarella, Rosemary, **Developing effective Learning Programs for Adults**,
https://research.acer.edu.au/cgi/viewcontent.cgi?article=1004&context=apc_monographs
- ➞ Council of Europe, Directorate of Youth and Sport: **T-Kit on Training Essentials**:
<http://pjp-eu.coe.int/documents/1017981/1667921/tkit6.pdf/459e262b-11f9-4af8-834f-c10c4cf4d30a>

¹ Often project cycles start with the analysis and then set the goals which in a way is a chicken or egg discussion as analysis and objectives influence each other.

- Forest, Ed: **The ADDIE Model: Instructional Design**,
<http://educationaltechnology.net/the-addie-model-instructional-design/>
- Gwang-Chol Chang: **Strategic Planning in Education: Some Concepts and Steps**,
<http://unesdoc.unesco.org/images/0015/001501/150191e.pdf>
- The Mind Tools Editorial Team: **Plan-Do-Check-Act (PDCA) Implementing New Ideas in a Controlled Way**: https://www.mindtools.com/pages/article/newPPM_89.htm
- UNESCO Institute for Educational Planning, **Educational Planning: approaches, challenges and international frameworks**, Distance Education Programme on Education Sector Planning,
http://www.unesco.org/new/fileadmin/MULTIMEDIA/FIELD/Beirut/images/Training_Module_1_on_Educational_Planning_Eng.pdf
- United States Department of Commerce, National Oceanic and Atmospheric Administration, **Designing Education Projects**, a Comprehensive approach to needs assessment, project planning and implementation, and evaluation,
www.oesd.noaa.gov/leadership/DEP_Manual_2ndEdt_Final.pdf

Needs Assessment

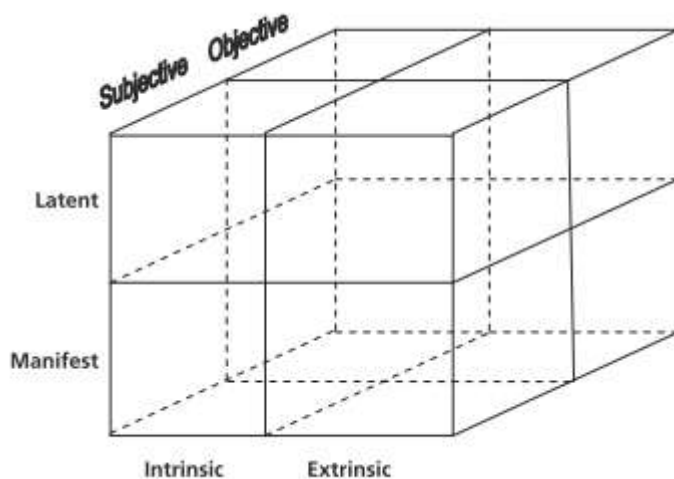
In good-quality adult education, pedagogies take their cue from what learners already know and value. Relationships between teachers and learners are central. Teachers and trainers need to understand the contexts in which learners live and how they make sense of their lives. Learner-centeredness, such as involving learners fully in the shaping of teaching and learning processes, is a vital quality determinant for adult educators.

- UNESCO Institute for Lifelong Learning: **Global Report on Adult Learning and Education**, Executive Summary,
http://www.aontas.com/download/pdf/confinteavi_grale_executivesummary_en.pdf

Despite deemed central for adult education (as highlighted in the quote cited above) and apparently being self-evident Needs are difficult to grasp. According to the Oxford Dictionary a need is

1. Circumstances in which something is necessary; necessity:
'the basic human need for food'
[...]
 2. a thing that is wanted or required:
'his day-to-day needs'
[...]
 - 3 The state of requiring help, or of lacking basic necessities such as food:
'help us in our hour of need'
- Oxford English Dictionaries, **Needs**
<https://en.oxforddictionaries.com/definition/need>

Once it comes to particularly assessing needs, the area turns murky, Simona Sava's cube on dimensions of needs may serve as an overview on the different 'shapes' of needs:



- ➔ Sava, Simona: **Needs analysis and programme planning in adult education.**, http://www.pedocs.de/volltexte/2015/10308/pdf/Sava_2012_Needs_Analysis_and_Programme_Planning_in_Adult_Education.pdf

On top of this complications it need to be asked who has a need, needs can be expressed by individuals, groups, communities, organizations, and societies. Even more needs shift over times and can be highly abstract at times.

In the same book Sava lists seven types of needs assessments:

1. Desk analysis
2. Field analysis
3. Trial and Error
4. Survey methods
5. Individual techniques
6. Group techniques
7. Specific methods of investigating the training needs within organizations
(ibid)

As it might be apparent by now, the subject can only be breached at the surface in the limited time available at Curriculum globALE. The training will introduce the Participants to one method each for education/training needs assessments, individual needs assessments, organizational needs Assessments, and community needs assessments.

- ➔ Community Toolbox, **Chapter 3. Assessing Community Needs and Resources** <http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources>
- ➔ Sava, Simona: **Needs analysis and programme planning in adult education.**, http://www.pedocs.de/volltexte/2015/10308/pdf/Sava_2012_Needs_Analysis_and_Programme_Planning_in_Adult_Education.pdf
- ➔ University of Kansas, Work Group for Community Health and Development: **Community Tool Box, Assessing Community Needs and Resources:** <http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources>

Planning and Organizing

Planning and Organizing refer to structuring projects and programs, in in terms of adult education this includes three elements which need to be considered:

- Overall program design (in terms of a logical framework)
- Curriculum development
- Operational planning

Program design fuses the two previous steps of the project cycle (needs assessment and setting of objectives) and breaks them down into operational units. In larger scale projects or programs this turns out to be a complex and challenging process at times: As the Participants will elaborate in Session Seven the needs and interests of different stakeholders will usually be conflicting and require a thorough balancing to ensure that the overall aims are met without having to deal with frictions later on during implementation.

On the technical side the core of planning, particularly if outside funding is required will be the development of a Logical framework:

According to UNODC a logical framework

... is a tool for improving the planning, implementation, management, monitoring and evaluation of projects. The log frame is a way of structuring the main elements in a project and highlighting the logical linkages between them.

- ➡ United Nations Office on Drugs and Crime, **Toolkit to Combat Trafficking in Persons**, https://www.unodc.org/documents/human-trafficking/HT_Toolkit08_English.pdf

The same document gives a simple example of the basic structure of a logical framework:

Simple log frame			
Objectives and outcome	Outputs and key activities	Indicators	Means of verification Important assumptions
<p>Objective: Describe what the target group will achieve if it changes its behaviour (in some cases this is a tangible benefit, in other cases, this is a step towards a future benefit at a higher level)</p>			
<p>Outcome: Describe the desirable future behaviour of the target groups—in which way the target groups will use the potentials described in the outputs (e.g. application of knowledge, adoption of practices, use of technology, etc.)</p>			
<p>Outputs: Describe potentials (technical or human resource potentials) established by the project</p>			
<p>Major activities: Describe major activities which need to be implemented in order to accomplish each of the outputs. (Activities must be realistically defined considering the resources available.)</p>			

(ibid.)

One way to elaborate a logical framework is to start with a problem tree analysis as used in session eight.

- ➡ British Overseas NGOs for Development, **Logical Framework Analysis**, Guidance Notes No. 4, <https://www.gdrc.org/ngo/logical-fa.pdf>

- ➔ Evaluation Toolbox, **Logframe Matrix**, http://evaluationtoolbox.net.au/index.php?option=com_content&view=article&id=29&Itemid=135
- ➔ United Nations Office on Drugs and Crime, **Toolkit to Combat Trafficking in Persons**, https://www.unodc.org/documents/human-trafficking/HT_Toolkit08_English.pdf

The word curriculum derives from the Latin currere meaning 'to run'. This implies that one of the functions of a curriculum is to provide a template or design which enables learning to take place.

- ➔ Mc Kimm, Judy, **Curriculum design and development**, [http://www.faculty.londondeanery.ac.uk/e-learning/setting-learning-objectives/Curriculum design and development.pdf](http://www.faculty.londondeanery.ac.uk/e-learning/setting-learning-objectives/Curriculum%20design%20and%20development.pdf)

A curriculum is an integral part of each educational measure, even though it might not be always called that way or be fixed in a written form. Traditional curriculum design has often been criticized as too focused on the teacher and knowledge while nowadays the perspective is on learning outcomes and the competencies to participants should develop during the program.

The perspective of this manual is, that when starting with a needs analysis and fusing it with a logframe the curriculum serves an auxiliary function: When starting from the impact and outcome of the respective program or project it should be ensured that the ends of training measures is a competency or an attitude and not mere collection of knowledge. Usually when designing an educational program, the competencies required need to be developed by a unique set of knowledge skills, and attitudes. These can be broken down into 'learning chunks' with an estimate of time needed to acquire these – like in curriculum globALE.

The level of elaboration of curricula varies, some curricula break down the lesson plans down to the minute and single activities while other are mere collections of content to be covered.

The level of elaboration depends on the context of the curriculum's use.

- ➔ Bahl, Anke et al., **What does it mean to provide process-oriented training?** in BWP Special Edition 2005, <https://www.bibb.de/veroeffentlichungen/en/publication/download/id/1081>
- ➔ Deutsche Gesellschaft für internationale Zusammenarbeit (Ed.), **Structures and functions of Competency-based Education and Training (CBET): a comparative perspective**, [https://www.giz.de/akademie/de/downloads/Lehrbrief_14_-_Competency-based Education and Training \(CBET\).pdf](https://www.giz.de/akademie/de/downloads/Lehrbrief_14_-_Competency-based_Education_and_Training_(CBET).pdf)
- ➔ Grundtvig International Network of Course Organizers, **Educational development and planning**, <http://www.ginconet.eu/content/educational-development-and-planning>
- ➔ Halász, Gábor; Michel, Alain in Florencio in: European Journal of Education, **Key Competences in Europe: interpretation, policy formulation and implementation**, <https://pdfs.semanticscholar.org/a750/30bb73c277002c402291b8f74964ae439fee.pdf>
- ➔ Hoskins, Bryony, Fredericksson, Ulf, **Learning to Learn: What is it and can it be measured?**, <http://publications.jrc.ec.europa.eu/repository/bitstream/JRC46532/learning%20to%20learn%20what%20is%20it%20and%20can%20it%20be%20measured%20final.pdf>

- Mc Kimm, Judy, **Curriculum design and development**, http://www.faculty.londondeanery.ac.uk/e-learning/setting-learning-objectives/Curriculum_design_and_development.pdf
- Tiana, Alejandro; Moya, José; Luengo, Florencio in: European Journal of Education, **Implementing Key Competences in Basic Education, reflections on curriculum design and development in Spain**, <http://onlinelibrary.wiley.com/doi/10.1111/j.1465-3435.2011.01482.x/full>

Operational planning entails the direct preparation of the training or workshop and roughly consists of the methodological planning of the process and getting the infrastructure/materials in place. Once the goal of an educational measure is clear, the detailed planning requires nothing more than structuring its elements as developed in session eleven which need to be ensured by a checklist as elaborated in session twelve. The literature on the praxeology of organizing a training is meagre, so the list below is more a collection of examples for checklists:

- Early Childhood Hearing Outreach, **Training Workshop Planning and Preparation Checklist**, <http://www.infanthearing.org/earlychildhood/docs/Planning%20Training%20Workshop%20Checklists.pdf>
- Kamp, Mathias: **Facilitation Skills and Methods of Adult Education**, a guide for civic education at grassroots level: http://www.kas.de/wf/doc/kas_29778-1522-2-30.pdf?111219190922
- Smith, Leonhard, **Checklist for developing a training**, http://web.calstatela.edu/faculty/elipton/Course_Pages/TECH%20489/Checklist%20for%20Developing%20a%20Training%20Program,%20SBA.pdf
- Training Today, **How to Conduct an Effective Training Session**, <http://trainingtoday.blr.com/article/how-to-conduct-an-effective-training-session/>
- UNICEF PATH Training Programme, **Checklist for PATH Training Workshops**, <https://www.unicef.org/pathtraining/Documents/PATH%20Programme%20Guide/Annex%20B%20Checklist%20for%20PATH%20training%20workshops.doc>
- World Bank, **Preparing your Training**, http://siteresources.worldbank.org/DEVMARKETPLACE/Resources/Handout_Workshop_Preparation_Checklist.pdf

Monitoring and Evaluation

Monitoring and evaluation both focus on gathering data in order to assess if, and how far, objectives have been achieved. While monitoring is focusing on a system which is an integral part of program design, evaluation aims on an external review usually by mid-term or the end of a project or program.

The Handbook on Planning, Monitoring and Evaluating for Development Results of the United Nations Development Program gives the following definitions:

Monitoring can be defined as the ongoing process by which stakeholders obtain regular feedback on the progress being made towards achieving their goals and objectives. Contrary to many definitions that treat monitoring as merely reviewing progress made in implementing actions or activities, the definition used in this Handbook focuses on reviewing progress against achieving goals. In other words, monitoring in this Handbook is not only concerned with asking “Are we taking the actions we said we would take?” but also “Are we making

progress on achieving the results that we said we wanted to achieve?” The difference between these two approaches is extremely important. In the more limited approach, monitoring may focus on tracking projects and the use of the agency’s resources. In the broader approach, monitoring also involves tracking strategies and actions being taken by partners and non-partners, and figuring out what new strategies and actions need to be taken to ensure progress towards the most important results.

Evaluation is a rigorous and independent assessment of either completed or ongoing activities to determine the extent to which they are achieving stated objectives and contributing to decision making. Evaluations, like monitoring, can apply to many things, including an activity, project, programme, strategy, policy, topic, theme, sector or organization. The key distinction between the two is that evaluations are done independently to provide managers and staff with an objective assessment of whether or not they are on track. They are also more rigorous in their procedures, design and methodology, and generally involve more extensive analysis. However, the aims of both monitoring and evaluation are very similar: to provide information that can help inform decisions, improve performance and achieve planned results.

- ➔ United Nations Development Programme: **Handbook on Planning, Monitoring and Evaluating for Development Results**,
web.undp.org/evaluation/evaluations/handbook/english/.../pme-handbook.pdf

If it comes to the design of a monitoring plan particularly in Adult Education some further distinctions are necessary:

Program monitoring: Most larger scale programs will already have a logical framework in place which come with SMART (see Session Thirteen) indicators in place. These indicators focus rather generally on achievement of desired output, outcome, and impact (similar to quality control described above). What they do NOT do is give an indication *why* an indicator was or was not reached (for example a vocational training is successful looking at the skills obtained but still the desired outcome in terms of job creation does not happen). Hence two more elements are needed:

1. Quantitative (=measurable) indicators need to be developed and monitored to keep track of developments in detail. This is the reason why every larger program should have a monitoring plan
2. Qualitative (=open) monitoring questions will need to complement the process as to get an idea of the perceptions of the stakeholders. In the example above it will be greatly enlightening to have interviews with prospective employees why or why not they hired the graduates of said vocational training

An additional challenge is posed by the purpose of monitoring also being *figuring out new strategies and actions need to be taken to ensure progress (ibid)* while usually projects and programs require to be planned coherently without the possibility of adjustments to be made without time-consuming consultations with the principal.

Training/course monitoring: An elaborated monitoring plan for a single training course is challenging because designing it is time consuming and possibilities of adjustments are often limited. Also some of the relevant issues to be monitored are usually not fixed in the taxonomy of learning objectives, e.g. satisfaction and motivation of participants, their trust in the trainer’s competency, appropriateness of the speed of course, etc. Trainers need to develop an ‘antenna’ to assess how far they are on track with their group, still sometimes it will make sense to have methods in place to make the ‘state of affairs’ of these issues visible.

Hence it is suggested to integrate levels of monitoring in a training/course setting analogue to the two elements described in program monitoring:

1. Monitoring is used to gather intersubjective data on issues regarding content and social situation in the course, e.g. a 'satisfaction barometer' by the end of each training day as practiced in the training plan further on. In a course design this is usually also formalized by a 'course evaluation questionnaire by the end of each training. If visualized (e.g. by using a 'sticker/dot voting') this can be used to obtain
2. Feedback. This can be used like a qualitative question to find out why things are as they are and dig deeper. For example, if some participants are not satisfied with the training the trainer can ask why they are not happy and what they wish to change. Feedback can also be obtained by third parties, e.g. by fellow trainers shadowing training sessions

Both elements should be included in trainings to improve the overall quality as neglecting one of them means either the trainer will know what he or she achieved in a course but will not be able to state why this happened or he or she will have clues about various opinions on the training without being able to give comprehensive evidence of success.

It needs to be noted, that qualitative information can be turned into quantitative data using clustering approaches, e.g. by grouping similar statements together.

As evaluation is usually done externally their concept is usually developed by either the principal or the training provider with the scope and guiding questions laid out in Terms of Reference. In most cases the five DAC Criteria for Evaluating Development Assistance are used:

Relevance

The extent to which the aid activity is suited to the priorities and policies of the target group, recipient and donor.

In evaluating the relevance of a programme or a project, it is useful to consider the following questions:

- *To what extent are the objectives of the programme still valid?*
- *Are the activities and outputs of the programme consistent with the overall goal and the attainment of its objectives?*
- *Are the activities and outputs of the programme consistent with the intended impacts and effects?*

Effectiveness

A measure of the extent to which an aid activity attains its objectives.

In evaluating the effectiveness of a programme or a project, it is useful to consider the following questions:

- *To what extent were the objectives achieved / are likely to be achieved?*
- *What were the major factors influencing the achievement or non-achievement of the objectives?*

Efficiency

Efficiency measures the outputs -- qualitative and quantitative -- in relation to the inputs. It is an economic term which signifies that the aid uses the least costly resources possible in order to achieve the desired results. This generally requires comparing alternative

approaches to achieving the same outputs, to see whether the most efficient process has been adopted.

When evaluating the efficiency of a programme or a project, it is useful to consider the following questions:

- Were activities cost-efficient?
- Were objectives achieved on time?
- Was the programme or project implemented in the most efficient way compared to alternatives?

Impact

The positive and negative changes produced by a development intervention, directly or indirectly, intended or unintended. This involves the main impacts and effects resulting from the activity on the local social, economic, environmental and other development indicators. The examination should be concerned with both intended and unintended results and must also include the positive and negative impact of external factors, such as changes in terms of trade and financial conditions.

When evaluating the impact of a programme or a project, it is useful to consider the following questions:

- What has happened as a result of the programme or project?
- What real difference has the activity made to the beneficiaries?
- How many people have been affected?

Sustainability

Sustainability is concerned with measuring whether the benefits of an activity are likely to continue after donor funding has been withdrawn. Projects need to be environmentally as well as financially sustainable.

When evaluating the sustainability of a programme or a project, it is useful to consider the following questions:

- To what extent did the benefits of a programme or project continue after donor funding ceased?
- What were the major factors which influenced the achievement or non-achievement of sustainability of the programme or project?

- Organization for Economic Co-operation and Development, **DAC Criteria for Evaluating Development Assistance**, <http://www.oecd.org/dac/evaluation/daccriteriaforevaluatingdevelopmentassistance.htm>

Even though these are not covered in the module they can provide a fruitful blueprint for reflecting on the overall quality of projects and programs of adult education.

- Austrian Development Cooperation: **Guidelines for Project and Programme Evaluations**, www.oecd.org/development/evaluation/dcdndep/47069197.pdf
- Bramley, Peter, **Evaluating Training** https://books.google.de/books?id=dPe0TgBpl7MC&printsec=frontcover&source=gbs_ge_summary_r&cad=0#v=onepage&q&f=false
- Ketlhoilwe, Mphemelang: **Course Evaluation in Adult Education Programmes In support of environmental and sustainability education processes**,: http://www.sadc-reep.org.za/uploads/documents/materials/Source_Book_5_Reduced.pdf

- Mauch Werner (Ed.), **Monitoring and Evaluation of Adult Learning**, Report on the Workshop Held at the CONFINTEA V Mid-term Review Conference, Bangkok, Thailand, September 2003, <http://www.unesco.org/education/uie/pdf/adedmonitoring.pdf>
- United Nations Development Programme: **Handbook on Planning, Monitoring and Evaluating for Development Results**, web.undp.org/evaluation/evaluations/handbook/english/.../pme-handbook.pdf
- University of Wisconsin: **Facilitator Tool Kit**, A Guide for Helping Groups get Results: <http://oqi.wisc.edu/resourcelibrary/uploads/resources/Facilitator%20Tool%20Kit.pdf>
- Wagner, Daniel, **Adult Literacy: Monitoring and Evaluation for Practice and Policy**, http://www.literacy.org/sites/literacy.org/files/publications/Wagner_AdultLit_ME_IntlRevEd_uc_08.pdf

Training Plan

Overview

The training days are planned for four sessions each, each 'block' consists two lessons with a total of 90 minutes and a coffee break of 30 minutes. Specific training times are not listed and may be adjusted as need be (standard is 9:00-10:30 first session, 10:30-11:00 coffee break, 11:00-12:30 second session, 12:30-14:00 lunch break, 14:00-15:30 third session, 15:30-16:00 coffee break, 16:00-17:30 final session).

Some sessions exceed 90 minutes and the overall timing is quite tight, so the Trainer should keep strict discipline if it comes to timekeeping. In addition, the coffee breaks of 30 minutes can be considered as a reserve if activities take longer than planned.

Preparation: Day One: Systems of Quality Management

The Participants may have to prepare their assignment in that case the presentation needs to be included in the training plan.

The preparation aims to provide the Participants with an overview on what systems of Quality Management exist and enable them with the basic knowledge necessary to apply their principles on their working context in Adult Education

Participants read

- ➔ Allais, Stephanie Matseleng: **Quality Assurance in Education**,
<http://vodppl.upm.edu.my/uploads/docs/QA%20in%20education2009.pdf>

Additionally, Participants should familiarize with the basic legal and institutional environment they are working in if this did not happen already in Module 1, an overview on country profiles can be found at

- ➔ Julius-Maximilian University of Würzburg: **Comparative Studies in Adult and Lifelong Learning (COMPALL)**
http://www.hw.uni-wuerzburg.de/compall/information_tool/country_reports_in_adult_education/

Session One: Welcome, getting to know each other, expectations

In the first session Participants get introduced to the program of the course, have the possibility to get to know each other and voice their learning needs.

In case the group has already worked together this session can be kept shorter

- Welcoming (10 Minutes)
- Quick round of introduction ('5 minutes, "Hello, my name is ..., I work for ... organization"), can be disregarded if the groups already knows each other
- Individual work: Expectations (10 minutes,)

The Participants write down

- What constitutes quality in their activities in adult education in one sentence
- What they expect from this training in this regard

- Group work (25 minutes): Participants are divided into four groups (four or five people per groups) using a random system (e.g. assigning 1,2,3,4,5,1,2,3, etc. to each group member, all 1s, 2s, etc. get together and form a group)

The assignment for the groups is:

- Introduction of the group's members to each other
- Collection of what they elaborated in the individual session

The participants produce a presentation of

- Who they are
 - What constitutes quality for its members and which inputs in this regard do they expect from this course
- Presentation in the plenary (25 minutes): The Participants present their findings, while the Trainer facilitates.

The individual statements need to be kept in order to be used at the wrap-up session.

In case the Participants are not familiar with feedback rules, they should be introduced (see Session One of Module 4).

It is important that the Trainer (see facilitation below) takes a neutral stance on the statements themselves and their authors.

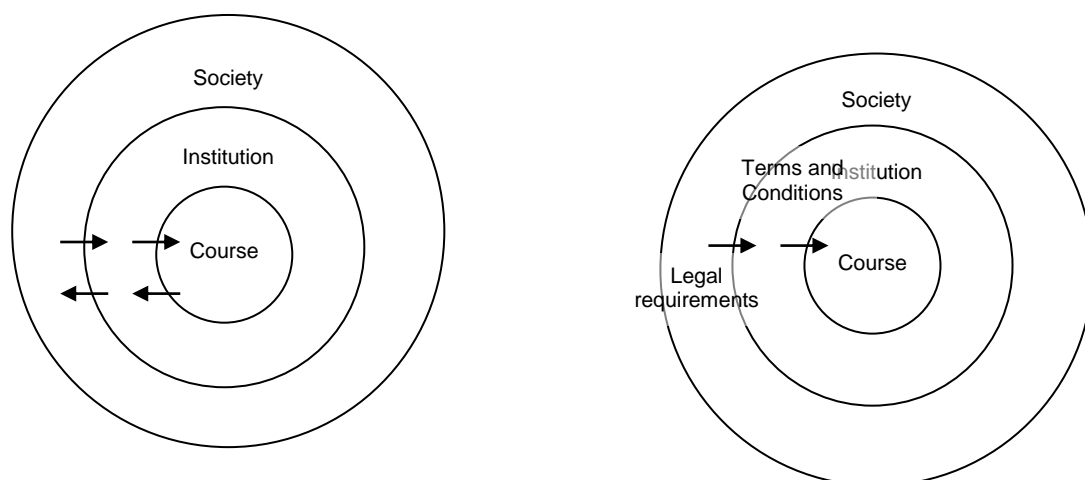
- Introduction of the program, open questions regarding the next three days (15 minutes, preparation: program on flip-chart, handout or via video projector).

The Trainer should refer to the statements made in the previous group presentations in order to clarify if expectations can or cannot be met

Session Two: Quality in Adult Education

The following session will introduce the Participants to a model to use for analyzing quality in adult education have them applying it to their context

The Onion Modell refers to the interrelations between society, institution and training:



The idea of this model is systemic: The general systems of the society and her subsystems (e.g. legal system, educational system, culture) influence the situation in the institution (e.g. what contracts do trainers get, what is the educational level of its clientele, what is the

attitude towards lifelong learning?) which in turn influences the quality of the course itself (how much time did the trainer spend in preparing, how motivated is he or she, what's the motivation and preconditions of the participants).

The model also works in the opposite direction, the situation in the course also reflects back into the institution and the society, e.g. happy participants spreading the word on the high quality of the training will lead to more popularity of trainings and promote a culture of lifelong learning.

(Critical minds will remark that this model is not entirely accurate as e.g. the cultural attitudes of the participants are not emitted through the particular institution. Still this model is complicated enough this way when applying, so the mentioned minds shall excuse this shortcoming).

Onion models are often used as a blueprint for process analysis, e.g. in the Ö-Cert System mentioned above or at the Art-Set System used in Germany which uses 11 dimensions to analyze the best possibilities for successful learning:

1. Mission Statement and Definition of Successful Learning
2. Needs Analysis
3. Key Processes
4. Teacher-Learner Process
5. Evaluation of the Educational Process
6. Infrastructure
7. Management
8. Human Resources
9. Controlling
10. Customer Relations
11. Strategic Development Goals

➔ Everett, Peggy, Müller Christian: **Comparative analysis of two quality management models in the U.S.A. and German**, in: Comparing Quality Management, <http://repositorium.sdum.uminho.pt/bitstream/1822/39507/1/Adult%20Learning%20and%20Education%20Policies,%202016.pdf>

- Introduction of the two models described above using a pin board or Flipchart (30 minutes, materials needed, prepared presentation, pin-board, flip-chart, cards, soft-tip pens)
- Four corners method (40 minutes, materials needed: Flip-chart paper, soft tip pens): The Participants form four groups and spend ten minutes in each corner working on:
 - 1st Corner: Legal standards and social customs influencing (positively or negatively) the learning set up in the Participant's trainings and their respective institutions
 - 2nd Corner: Internal regulations of their training provider influencing (positively or negatively) the learning set up in the Participant's trainings
 - 3rd Corner: The Participants own measures influencing (positively or negatively) the learning set up in the Participant's trainings
 - 4th Corner: Influences of Participants' training outcomes to lifelong learning in their respective society

It needs to be noted that this session may need to be tailored according to the composition of the group, the described way above will work with a homogenous group of Participants from one country or countries with a similar structure or culture. If the

Participants are from diverse backgrounds, the groups need to be composed accordingly and methodology needs to be adjusted (e.g. by putting the four questions together in a group work).

Presentation of outcomes and discussion (20 minutes), this will quite naturally lead to an assessment of policy needs on national and organizational levels in order to improve the quality of adult education.

Session Three: Project Planning Cycle

- Lunchtime is over, time for some energizer to wake the Participants up. Suggested game: Musical chairs (10 minutes, material needed: Music player, chairs): A number of chairs, one fewer than the number of players, are arranged facing outward with the players standing in a circle just outside the chairs. Music is played while the players in the circle walk in unison around the chairs. When the music stops each player attempts to sit down in one of the chairs. The player who is left without a chair is eliminated from the game. One chair is then removed/eliminated to ensure that there will always be one fewer chair than there are players. The music resumes and the cycle repeats until there is only one player left in the game, who is the winner.
- Presentation of the project planning cycle as described above (20 minutes, materials: Flip-chart, pin-board or screen presentation)
- Individual Work (30 minutes, materials: paper and pen, copy of the project planning cycle)
In a first step the Participants write down how the steps of the cycle are taken care of in terms of methods and processes used in the educational measures they are involved in.
In a second step the Participants determine which of the methods and processes yield good results and which do not or are not even established.
- Group work (30 minutes, material: Flip-chart paper, soft-tip pens)
The Participants chose their group (4-5 members) to their liking and compare their results, in case one Participant has a success-story where another has a deficit in the organization they should share their experiences (e.g. if one Participant has an elaborate and successful way to plan his or her trainings it can be introduced to the others if they are interested).
The Participants gather their general findings for the later presentation
The groups agree on one area they want to prepare an input of 15 minutes on during one of the next sessions (so either needs assessment, planning, organizing or monitoring and evaluation).
- Presentation of group results and agreement on which groups shall prepare which inputs (15 minutes)

Session Four: Needs Assessment: Organization

This session features similar contents of the visualization session of Module 4, in case the Participants already took this course the Trainer needs to take care to highlight the methodical aspects of the needs assessment instead of focusing on the facilitation/visualization element of the session

- Introduction of needs assessments and its challenges based on the introduction by the Trainer (10 minutes)
- The Trainer introduces the SWOT analysis for organizations to the participants (10 minutes, materials needed Flip-Chart, soft-tip pens):

Strengths = Positive internal factors, e.g. a strong management	Weaknesses = negative internal factors, e.g. such as low payment for trainers
Opportunities = Positive external factors, e.g. such as funding available through legislation	Threats = negative external factors, e.g. strong emerging competitors

- Groupwork: SWOT (25 minutes, material needed: Flipchart, soft-tip pens)
The group is divided into three sub-groups of six Participants each

The group conducts a SWOT analysis focusing on providers of adult education in their respective country

Please note that most probably ambiguities will turn up (e.g. a strength is a weakness at the same time depending on the angle used), this should simply be documented and not 'solved'.

- Presentation (10 minutes): The Participants present the main findings of their group work
- Conclusions (20 minutes): The Participants discuss what to do with the outcome of this session, how to use SWOT in their working environment

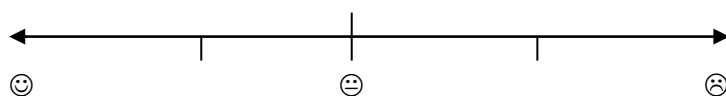
In general strengths should be at least kept or enhanced, weaknesses worked on, Opportunities pursued and Threats mitigated against/prepared for.

Please keep the presentations for use on the second day

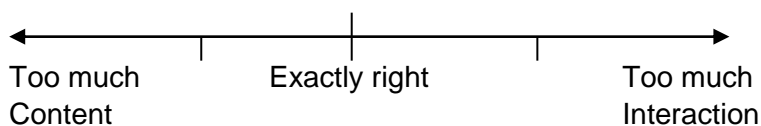
- Closing session: Sticker feedback (15 minutes, preparation: Flip-chart, soft-tip-pens)

The flipchart is turned away from the plenary and participants make a dot at the appropriate places at the diagram:

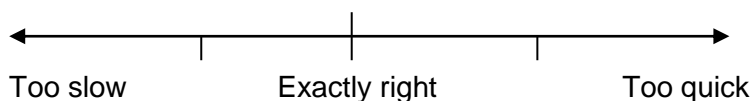
How do I feel in the group?



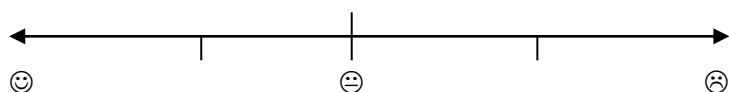
How is the balance of content vs. Interaction?



How is the timing?



How satisfied are you with the trainer's performance?



The flipchart gets turned so everyone can see after everyone made their point.

The Trainer can use this feedback as a starter for an in depth discussion, e.g. if the scoring yields 'too much interaction' the trainer may ask what type of content the participants want.

Preparation: Day Two: Individual Needs Assessment: ProfilPASS

The Participants may have to prepare their assignment as agreed upon after Session Three, the presentation of which needs to be included in the training plan.

The Participants should familiarize themselves with the ProfilPASS (which can be downloaded at http://www.profilpass-international.eu/files/pp_english.pdf), fill the overview on 'My Life' at pages 11/12 and do the self-assessment for their competencies in one of the areas described from page 13 onwards.

The ProfilPASS has been developed since the early 2000s by a consortium of Educational institutes as a methodology to identify competencies and potentials based on the biography of the user. The strength of the system is to enable these to express their strength and elaborate a plan to improve their competencies.

- ➔ Deutsches Institut für Erwachsenenbildung, Insitut für Entwicklungsplanung und Strukturforschung, **ProfilPASS, Stärken kennen, Stärken nutzen**, <http://www.profilpass.de/> (German only)

Session Five: Needs Assessment: Individual Needs Assessments and Gap Analysis

The Participants will get to discuss one possibility of doing an individual needs assessment and explore its potentials

- Welcome of Participants, introduction of today's itinerary (10 minutes)
- Flashlight (15 minutes): How do you feel and what do you expect for today?

Short introduction of Flashlight: In turn, everyone is asked to share their thoughts on a common on a single issue, e.g. how do you feel today, what are you looking forward to for today, what do you think about XYZ. Statements should be brief and are not to be commented by others (also not by the Trainer). The method can also use for the closing of the day or in crises to get a picture of what the Participants are at and initiate a discussion afterwards.

- Open discussion on questions regarding the use of the ProfilPASS and experiences during use (20 minutes)

- Video Viewing: Gap Analysis (10 minutes, material needed Video-projector, Computer with sufficiently quick internet connection):
 - Pratt, Paul: **What is Identification of Training Need?**
<https://www.youtube.com/watch?v=8eYypAULJHE>
 - Mind Tools Editorial Team: **Gap Analysis**, Identifying What Needs to be Done in a Project, <https://www.mindtools.com/pages/article/gap-analysis.htm>
 - New Schools Network, **Skills gap analysis tool**,
www.newschoolsnetwork.org/sites/default/.../Skills%20gap%20analysis%20tool.doc
- Group work on fusing a gap analysis and the ProfilPASS (30 minutes, material needed: Flip-chart paper, soft-tip pens)

Four groups are formed according to similar area of work and elaborate

 - In which way do ProfilPASS and gap analysis as introduced contradict or complement each other?
 - How can they be relevant to the respective working environment of the Participants?
 - If applicable: How they can use such methodology in their work environment
- Presentation of results (25 minutes)

Session Six: Needs Assessment: Community Needs Assessment

In this session participants will learn about beneficiary selection and scoring as tools for conducting a community needs assessment

- Video Viewing: Community needs assessment: The Participants watch the video
 - UCA News: **Assessing the needs of Cambodia's rural poor**
<https://www.youtube.com/watch?v=8GvFJ3kZWzA> (8 minutes, material needed: video projector, computer with a reasonable internet connection)

Discussion in the plenary (20 minutes):

- In how far is this already a needs assessment?
 - What are the strength and weaknesses of this approach?
- Scoring Exercise (60 minutes, material needed: Flip-chart Pin-Board, cards, soft-tip pens, small round stickers)

The Trainer reminds the participants of the SWOT analysis of training providers in adult education on the first day and collects five main criteria of rating their importance in the view of the Participants (e.g. relevance for target group, possibility to change, etc.).

From each presentation of session four the respective sub-group chooses the two most important issues they identified.

From the two 'collections' a scoring matrix is formed:

Criteria → Issue ↓	Criterion A	Criterion B	[...]	Score
Issue A				
Issue B				
[...]				

If the Trainer is up for it he or she can also discuss if there is a very important criterion which should be counted twice during the scoring

The Participants get six little round stickers for scoring each criterion, they should give three points for the issue that fulfills the respective criterion best, two for the second best and one for the third. This is repeated until all Participants have scored all criterions.

There will surely be Participants who will not be able to decide and will ask to put three times two stickers, or the like. They might do so; the Trainer only needs to make sure no Participants dumps all of his or her stickers on one issue.

The Trainer counts the score in a horizontal line to come up with the rating thus identifying the most important issue:

Criteria → Issue ↓	Criterion A	Criterion B	[...]	Score
Issue A	3	1	7	<u>11</u>
Issue B	12	9	5	<u>26</u>
[...]	4	2	0	<u>6</u>

The Participants discuss the pros and cons of this approach and how it might be used in their context.

If the Trainer feels up for it, he or she can also focus on the social dynamics of this session

Session Seven: Needs Assessments: Stakeholder Analysis

In the following session the Participants will reflect on the needs of the actors involved in their respective educational measures.

Please note that this session will take longer than 90 minutes

- After lunch again – time for an energizer (5 minutes):

Better practice this one before

Number Six:

- Make the Participants stand up
- Raise your right foot
- Draw a circle with your foot anti clockwise (pause and let them practice and find their balance)

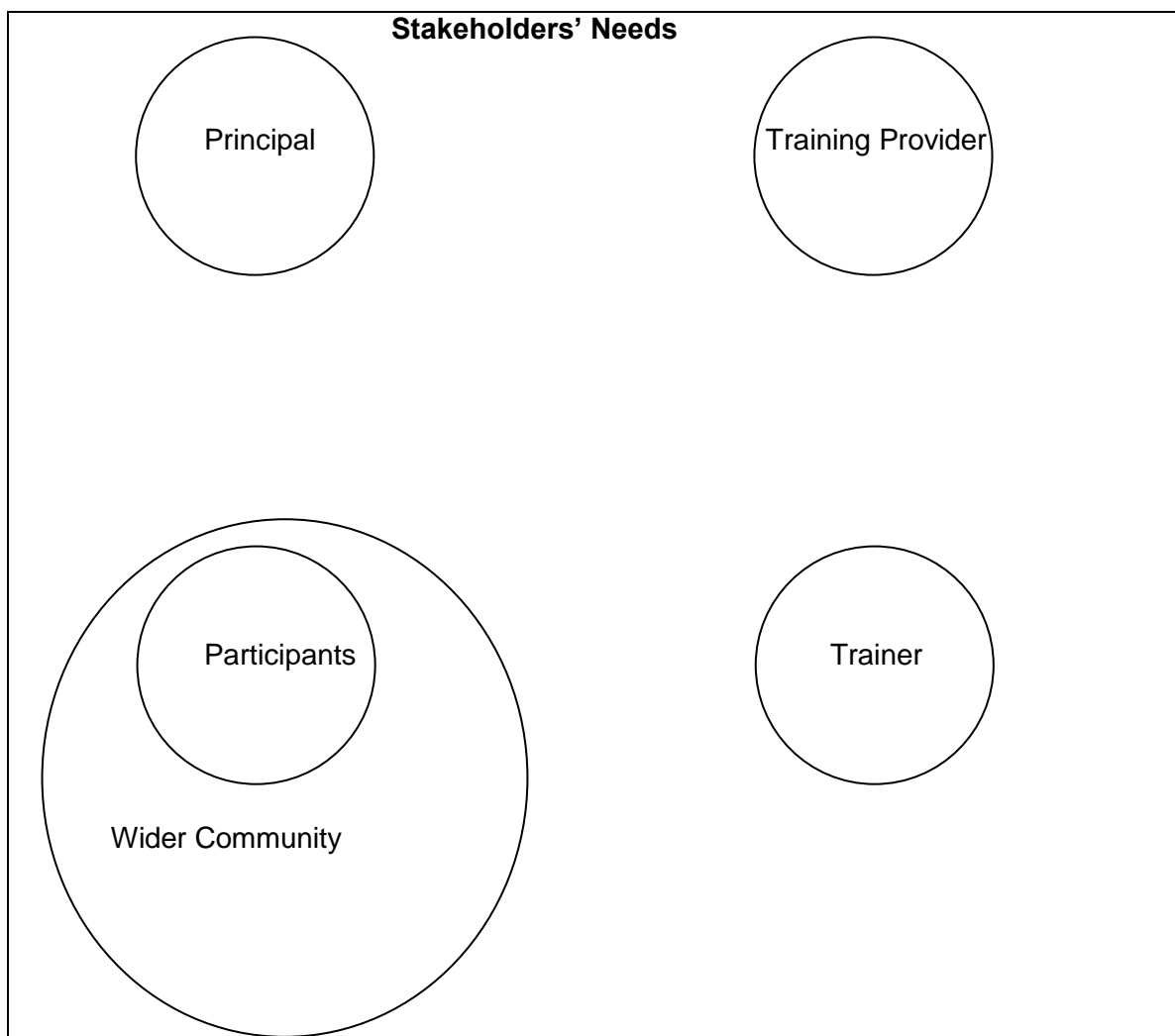
- Lift your right arm in the air with your index finger pointing out
- Draw with your finger, the number six, starting from the inside up (this is opposite to how most people write the number 6)
- Keep circling that foot anti clockwise

This should result in some hilarious confusion

⇒ Knowledge Base Central: **How to energize your class, to ensure your students continue learning:**

<http://knowledgebasecentral.co.nz/TUTOR+RESOURCES/Activities/Energizers.html>

- Reflection on Needs: (30 minutes, material needed: handouts,) The Participants receive a handout looking like this (allow ample space as there will be lots to write down:



The Participants individually chose one training course or program they are working in and write down

- the relations between the different actors
- the needs and interests of the different actors

The Principal is the financing institution of the training, e.g. a company or a donor institution, in some cases there is no principal, e.g. if the participants pay for joining

- The Participants get together in pairs and reflect on
 - Converging and conflicting interests/needs
 - How the respective needs are currently assessed or may be assessed

This should take about 20 minutes

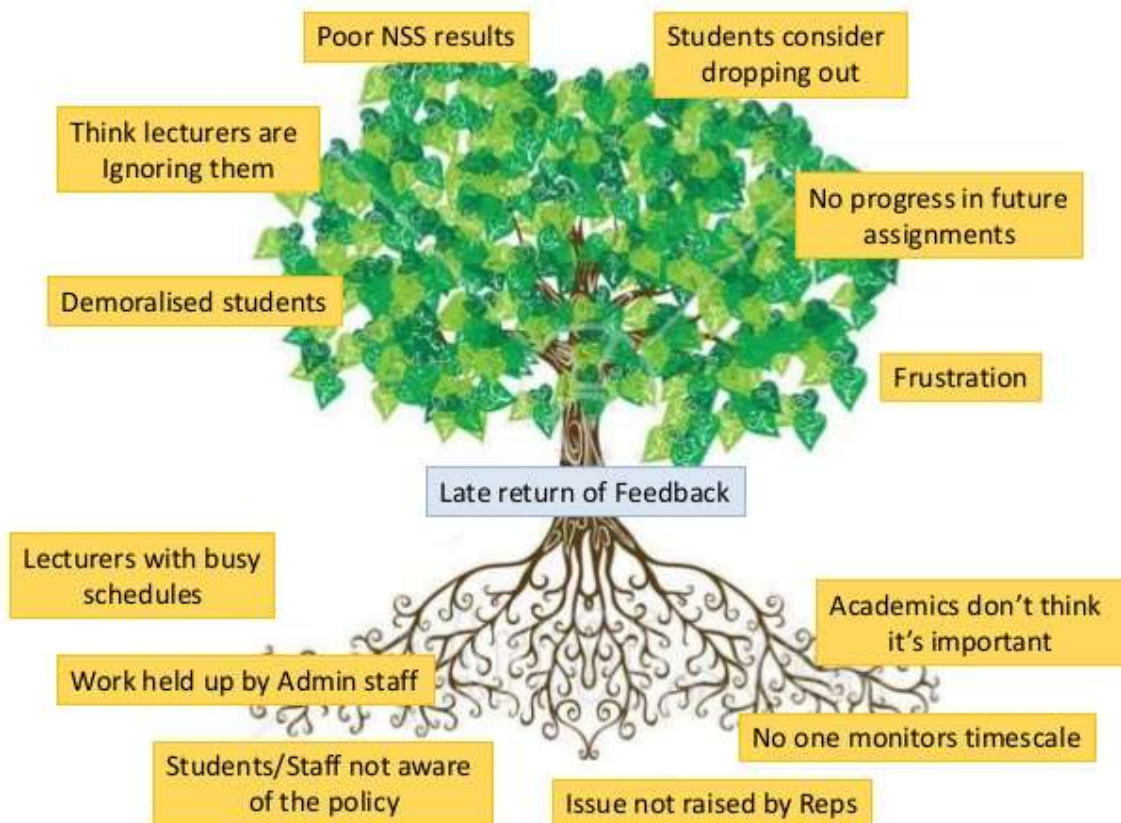
- The Participants form groups of four or five and work on how their findings influence their work and what they can do to improve the overall setup of the project/program they are engaged in (30 minutes).
- Wrap up (30 minutes): The plenary reconvenes and the Participants share their views on the previous session's outcomes.

Session Eight: From Needs to Plans: Problem/Solution Tree

In the followings session the Participants will get to know the problem/solution tree as one way to transform a perceived need into a project to tackle the issue.

Please note that the feedback session stretches this section beyond 90 minutes.

A problem tree is used to break down the root causes of an issue to be better able to understand which factors lead to its existence, for example:



- ➔ Catherine, Jenny, **Problem Tree**, breaking down problems, <http://www.slideshare.net/JennyCatherine1/problem-tree-44261668>

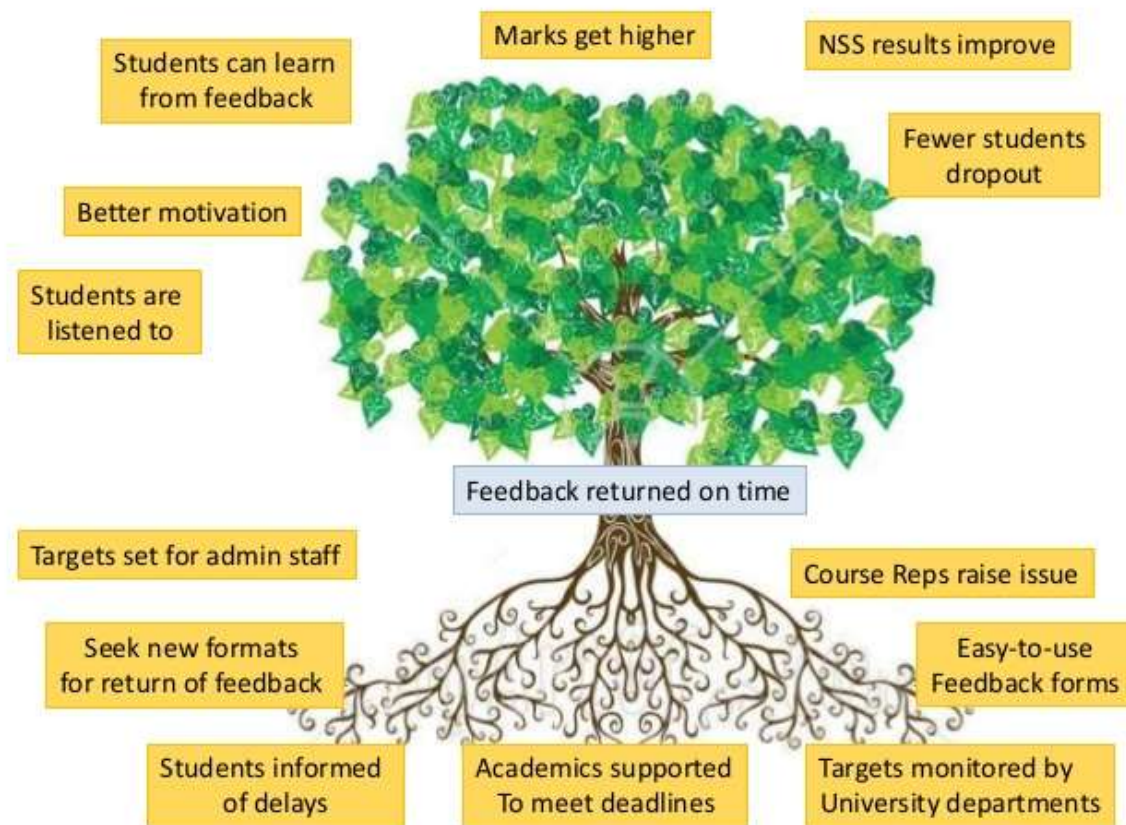
A basic problem tree consists of three elements:

- The cause of a problem
- The problem itself

- The effects of the problem

In many cases causes and effects can be displayed on several levels as often issues on both levels are interrelated or one issue leads to another.

The second step is to turn the problem tree into a solution tree by turning the tree upside down and reversing the effects with the basic question: What factors need to change in order to solve the problem:



(ibid.)

By completing a problem tree analysis, the foundation is laid to develop a logical framework which will be dealt with on Day Three

- Catherine, Jenny, **Problem Tree**, breaking down problems, <http://www.slideshare.net/JennyCatherine1/problem-tree-44261668>
- Evaluation Toolbox, **Problem Tree / Solution Tree Analysis**, http://evaluationtoolbox.net.au/index.php?option=com_content&view=article&id=28&Itemid=134

- Input problem/solution tree (15 minutes, material needed: Video Projector and Computer or pin board). The Trainer introduces the Participants to the systematics of a problem/solution tree
- Groupwork (20 minutes, material needed, Flip-chart, soft-tip pens) The Participants form four sub groups and elaborate a problem- and a solution-tree for the issue identified in Session Six
- Presentation of the groups' results (20 minutes)
- Open discussion on the suitability of the trees for planning processes (20 minutes)

The Trainer should take care not to drift in a discussion on the actual outcomes but focus on the process and the reasons why (most possibly) quite different trees have been developed. The Participants would be sensitized on the amorphous nature of concepts used (the connotations of a need are quite different from one person to the other) and should be made aware that needs can be analyzed in various ways without one way necessarily being better than the other. The quality of the analysis may only become apparent once tested in 'real life'.

- The Trainer hands out the preparation of Day Three (15 minutes):
The Participants should conduct a problem/solution tree analysis for the project they have been working on at Session Seven and produce a poster presentation on it
- Wrap-up of the session by the sticker feedback as used by the end of Day One (15 minutes)

Preparation: Day Three: Planning and Organization: Learning Outcomes

Some Participants may have to prepare their Assignment as agreed upon after Session Three, the presentation of which needs to be included in the training plan.

The Participants will familiarize themselves with

- ➔ Kennedy, Declan; Hyland, Áine; Ryan, Norma: **Writing and Using Learning Outcomes: A Practical Guide**, in: Journal of the European Higher Education Area, C 3.4-1, <http://reforma.fen.uchile.cl/Papers/Writing%20and%20Using%20Learning%20Outcomes%20-%20Kennedy,%20Hyland,%20Ryan.pdf>

The article describes how to write Learning Outcomes for different areas of learning and will be used as background information for the development of a log frame

The Participants will develop a problem/solution tree as assigned in Session Eight

Session Nine: Planning and Organizing: The Phase Modell

The Participants will keep working on their problem/solution tree and transform it into a program.

The Phase Modell focuses on the phases of any transformative process:

Input → Throughput → Output → Outcome → Impact

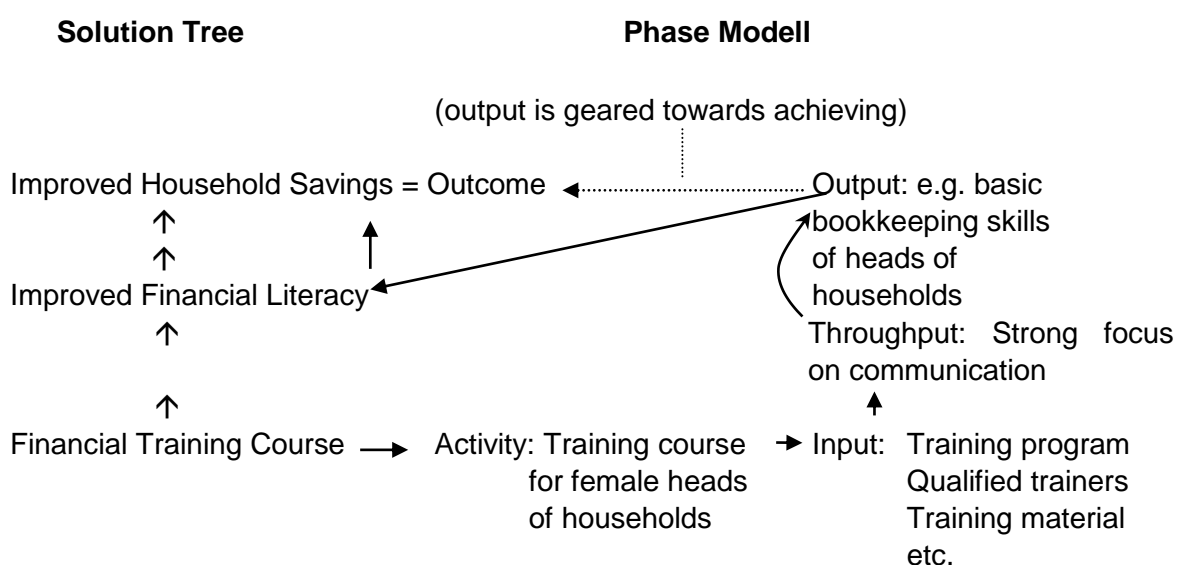
Input describes the elements in preparing the respective action (and their quality), e.g. qualification of the trainer, devices available at the venue, training material used

Throughput describes the elements during the training such as adeptness of the trainer to deal with group dynamics, group size etc. (the before mentioned critical mind may point out that these elements can also be taken as an input, still the distinction is made to have an eye for elements which are predictable before a training and 'things that happen' during trainings which need to be dealt with spontaneously).

Output describes the results of the training, what did the participants learn, what skills did they acquire, how did their attitude change. Essentially in this phase it is checked what has been achieved.

Outcome and Impact (sometimes also utilization of outcome) are the later stages of what the participants do with what they learned (most people will be familiar with LOG-Frames in their various forms). For example, a craftsman learns a new business skill (Output) which he uses to set up a workshop and generate income (outcome). This in turn will contribute to the GDP and yield more taxes for the state (impact). In a way this is another way of describing the changes triggered by the course described in the onion model.

- Welcome of Participants, introduction of today's itinerary (10 minutes)
- Flashlight (15 minutes): How do you feel and what do you expect for today?
- Input: Phase modell (30 Minutes, material needed: Screen Presentation or Flipchart/pin board The Trainer describes the phase modell along the lines stated above and highlights the link between the phase model, e.g. in terms of Financial Literacy:



- Individual work: Phase modell (30 minutes): The Participants use one of the branches to develop a basic phase model for one activity to tackle the issue
- Feedback tandems (15 minutes): Two Participants get together and review their outcomes, these are kept for further use during the next session.

Session Ten: Planning and Organizing: The Logical Framework

In this session the Participants will be introduced to the logical framework which is a standard instrument for planning educational measures and a more elaborated form of the phase modell.

- Input Logical Framework (25 minutes, material need Video Projector, Computer with internet connection of sufficient speed) The Trainer introduces the Participants to the logic of logical frameworks using
 - Bregnhøj, Henrik: **Logical Framework Approach**, https://www.youtube.com/watch?v=TkS0_mymJHU. Questions are answered after the video if needed.

Note that this presentation uses a different terminology, the outcomes are called intermediate objective, Impact is called Development objective

- Exercise logframe (20 minutes, material needed: logframe template): The Participants adjust their phase model from the last session and fill out a basic logframe:

	Description	Indicators	Means of Verification	Risks / Assumptions
Goal				
Outcomes				
Outputs				
Activities				
Inputs				

- Feedback tandems (15 minutes): Two Participants get together and review their logframes.
- Groupwork (20 minutes): The Participants form four groups of their choosing and discuss the suitability of the logframe approach for their planning processes
- Wrap up (10 minutes): The group gets back together in the plenary and discuss if and how they will use logframes for further planning

Session Eleven: Planning and Organizing: Logical Framework

Session Twelve Operational Planning

In this session the Participants will look into how they plan their educational measures at present and how this could be improved.

Please note that this session needs 180 minutes and stretches over half a day so the break needs to be had flexibly in-between

The easiest way to do the fine planning is to have a comprehensive table which lists all the requirements stated below:

Group Characteristics: (e.g. number of participants, age, previous experience)
 Overall Objective of the training/course: (e.g. introduction to SWOT)
 Venue: (e.g. large training hall of a convention center)
 Overall timeframe: (e.g. 90 minutes)

Overall timing	Time for unit	Method used	Content	Aims	Material Needed	Remarks
9:00-9:15	15 Minutes	Presentation	Elements of SWOT	Participants are familiar with the overall concept of SWOT	Flip-chart Soft-tip pens	Include example for better understanding
9:15-9:40	25 Minutes	Groupwork (3*6 participants)	Practical application of SWOT	Participants apply SWOT	Flip-chart paper Soft-tip pens	Use a subject all participants are familiar with Be ready to support in case ambiguities do happen
Etc.						

Still there are other ways to put it e.g. using a mind map, the main task of the trainer is to guide the participants to develop a way including all relevant information

Please note that planning often requires 'an educated guess', processes in discussions and group-works cannot be predicted to the single minute. Once a trainer gets more experienced and knows a group better, the predictions will become more accurate but still more often than not trainings turn out different than planned.

Once the table is completed, it needs to be turned into a checklist so details do not get forgotten in the pre-training stress, or as it is written in the Community Tool Box:

Believe it or not: how people sit, whether they are hungry and whether they can hear can make or break your planning process. As a facilitator, the logistics of the meeting should be of great concern to you, whether you're responsible for them or not. Some things to consider are:

- *Chair arrangements: Having chairs in a circle or around a table encourages discussion, equality, and familiarity. Speaker's podiums and lecture style seating make people feel intimidated and formal. Avoid them at all costs.*
- *Places to hang newsprint: You may be using a lot of newsprint or other board space during your meeting. Can you use tape without damaging the walls? Is an easel available? Is there enough space so that you can keep important material visible instead of removing it?*
- *Sign-In sheet: Is there a table for folks to use?*

- *Refreshments: Grumbling stomachs will definitely take folks minds off the meeting. If you're having refreshments, who is bringing them? Do you need outlets for coffee pots? Can you set things up so folks can get food without disrupting the meeting? And who's cleaning up afterwards?*
- *Microphones and audio visual equipment: Do you need a microphone? Video cameras? Can someone set up and test the equipment before you start?*

- Axner, Marya, **Community Toolbox, Section 2, Chapter 16, Developing Facilitation Skills**, <http://ctb.ku.edu/en/table-of-contents/leadership/group-facilitation/facilitation-skills/main>

A comprehensive checklist can be found at pp. 71/72 of

- Action for the Rights of Children: **Facilitator's Toolkit**: <http://www.unhcr.org/4371d7c92.pdf>

- Energizer (5 minutes): Entangle Yourself
 - Ask the group to form a circle
 - Ask everyone put their hands up
 - Ask the Participants to close their eyes
 - Ask the Participants to grasp a random hand with their left and their right hands
 - Ask the group to untangle themselves without letting the hands go, and try to form a circle

Please note that this method is not appropriate for all cultures and needs to be used with sensitivity

- Fun Retrospectives: **Entangle yourself**, <http://www.funretrospectives.com/untangle-yourself/>
- Opening discussion (10 minutes): The Participants talk about their experiences in organizing their trainings
- Group work (20 minutes): The Participants form four random groups and discuss how they plan for their trainings. They should come up with a way to organize the process which *at least* includes:
 - Time
 - Methods
 - Content
 - Aims
 - Material needed
 - Space needed
 - Group characteristics
- Group presentation (25 minutes): The groups present their suggestions and discuss the advantages and disadvantages of each system
- Individual work on training plan (30 minutes): The Participants use the frame their group developed to plan one training session they are familiar with.

90 minutes are up, time for a small break

- Group work (30 Minutes, material needed: Flip-chart, soft-tip pens): The Participants form three groups of their liking and go through their plans and collecting issues which need to be communicated, discussed and/or taken care of by the stakeholders involved:

	Communicate	Discuss	Take care of
Participants			
Training Provider			
Host/Venue			
Trainer			
Principal			

- Group presentation (20 minutes): The groups present their findings and discuss how the various issues usually get communicated to the respective stakeholders (or not).
- Group work (20 minutes, material need: flip-chart paper, soft-tip pens): The Participants form six groups of two or three members each and turn the findings of the previous activity into checklists for the stakeholders involved
- Plenary (20 minutes): The participants share their findings to the group, the checklists are amended in case issues got forgotten
- Wrap-up of the day by the sticker feedback as used by the end of Day One (15 minutes)

Preparation: Day Four: Evaluation in Adult Education

Some Participants may have to prepare their Assignment as agreed upon after Session Three, the presentation of which needs to be included in the training plan.

The Participants will familiarize themselves with

- ➔ Kethoilwe, Mphemelang: **Course Evaluation in Adult Education** Programmes in support of environmental and sustainability education processes, http://www.sadc-reep.org.za/uploads/documents/materials/Source_Book_5_Reduced.pdf

Note that the Participants do not need to read all case studies.

In addition, each Participant should at least collect five methods of monitoring learning progress.

Session Thirteen: From Planning to Monitoring: SMART Objectives

In this session the Participants will get to know about the formulation of SMART objectives in order to link their monitoring to the objectives stated in their logical framework

Putting objectives and indicators SMART serves to formulate these in a way that they can be measurable (see Introduction on monitoring and evaluation).

The abbreviation stands for

- S**pecific - the objective refers to a specific area (who, what, how, where)
- M**easurable - the objective refers to a measurable quantity
- A**ttainable - the objective can be attained with the resources and the time available
- R**ealistic - the objective realistically fits within the other aims of the logical framework
- T**ime-bound - when the objective will be reached is defined

For example, a smart objective for the success of this session is:

By the end of this session	90%	of the Participants	are able to formulate	SMART objectives for successful attainment of learning outcomes in their courses
Time Bound	Measurable	Specific (who)	Specific (how)	Specific (what)

It is realistic to attain the objective in a session of 90 minutes

The objective fits in the general frame of curriculum gobALE as its content features 'Defining learning objectives ([...], SMART, [...])

Even though the SMART way of putting objectives is quite simple using it in educational reality is not:

- Learning/knowing/being competent are not directly measurable and either need to be avoided or underpinned by an indicator (e.g. XY% of participants can name what the abbreviation SMART stands for).
- To define an attainable and measurable objective is often quite challenging (in the example above, are 100% or 50% appropriate?) and up to an 'educated guess'. The general guideline is to try to reach a level which can be reached with significant effort (so 50% is too low for sure as probably some Participants are already familiar with SMART, 100% is probably too high as maybe a single Participant will be outside class for some time or reject SMART on political grounds ('neoliberal treadmill for the working man'))
- In a lot of cases there will be no baseline to contrast a SMART objective against which is needed to state that the learning progress has been resulted by the training (so theoretically 100% of the Participants may have already known SMART and were confused by the training so de-facto the training has made things worse). The way to deal with it are either to formulate the objective indicating progress (25% more of the Participants are able to...) but then a baseline needs to be established regardless, or to just except the fact that compromises need to be made and some elements will just to be accepted as 'reasonable'
- The nature of SMART objectives leads to a certain risk of 'technifying' learning objectives:
 - a) SMART indicators are not able to grasp concepts in its totality, so the objective 'XY% of participants are able to state the name of all six major parties and their leaders' might fall short of the possible aim of '...participants are empowered...'. This can be avoided by differentiating between indicator/objective and 'being aware'
 - b) If not having SMART objective linked to a logical framework there is a certain risk to end up using objectives which are leaning on the knowledge/input side, simply because these are easier to come up with. This can be mitigated against by having SMART success indicators 'further up' the impact chain so you know if your training on Women Rights really lead to their stronger political participation
- Last but not least: SMART objectives are a tool in order to make achievements visible to all stakeholders and need to be applied using a feasible amount of effort. It is possible to spend more time measuring success than actually producing it, so if an objective is reasonable, just stick with it, even though there *could* be doubts (as the author of this module did by using the example above).

- ➡ Colorado Department of Education: **Adult Learner Goals Toolkit**: Instruments for setting goals, exploring feelings about goal work, revisiting goals and celebrating goal

achievement, <http://www.kyae.ky.gov/NR/rdonlyres/CF812CA4-EB61-4B3C-98BD-BD6DF044AF42/0/AdultLearnerGoalsToolkit.pdf>

- Peters, Greg, **Attainable vs. Realistic**,
clearing-confusion.blogspot.com/2008/03/attainable-vs-realistic.html
- Peterson, Dep, **What Is SMART and How Do I Write SMART Goals?**,
<http://adulted.about.com/od/personaldevelopment/ht/smaartgoals.htm>
- Condelli, Larry, **Evaluation Systems in the Adult Education Program: The Role of Quality Indicators**,
http://www.air.org/sites/default/files/downloads/report/EvSys_0.pdf

Please note that there are some deviations if it comes to single letters, e.g. A for action oriented or assignable and that some Participants may already be familiar with a slightly different terminology.

- Welcome of Participants, introduction of today's itinerary (10 minutes)
- Flashlight (15 minutes): How do you feel today and what do you expect for today?
- Input: SMART Objectives (15 minutes, material needed: Flip-chart), presentation along the lines of what is described above

This can also be done by Participants as one of their assignments but the Trainer has to make sure they are using the same terminology as to avoid confusion

- Individual work (20 minutes): The Participants use their logical framework from session ten and formulate their objectives in a SMART way. For outcomes and Impact they may use indicators.
- Group work: Mutual Feedback of SMART objectives (20 minutes): The Participants get together in four groups of four or five and discuss the objectives/indicators they developed
- Wrap up (10 minutes): The Participants discuss their experiences transforming their indicators.

Session Fourteen: Monitoring and Evaluation: Methods

The Participants will get an overview on what methods there are available for Monitoring and Feedback during educational measures in this session.

The Trainer needs to be prepared that Participants already are using an 'intuitive way' of monitoring the progress of their trainings/courses and are not necessarily open to use ways to make this progress visible. Instead of trying to convince the Participants the Trainer should rather point out the advantages the Participants get out of monitoring procedures, e.g. learning progress can be communicated to participants and other stakeholders

- Introduction to the concepts of Monitoring, Evaluation, and Feedback along the lines of the introduction (20 minutes, material needed: flip-chart or screen presentation)
- Collection of methods for monitoring and feedback (20 minutes, material needed: five pin boards or large roll of paper, cards, soft-tip pens, blue tag in case paper roll is used):
The Participants are asked to write down all methods they know for monitoring and obtaining feedback and allocate them to the respective phase:

	Input	Throughput	Output	Outcome	Impact
Monitoring					
Feedback					

- Run through the methods (40 minutes): The Trainer goes through the methods, the pinning Participants give a quick explanation in case needed of how the method is conducted

Questionnaires

The Participants will surely name questionnaires as a way of monitoring and getting feedback. The design of questionnaires is a whole science to itself and requires far more time than is available for this module. Just to give a quick overview:

Questions can be either qualitative, quantitative or a mix of both

Qualitative questions are open questions which leave the answer to the respondent, e.g. what do you think about the methodology used, how will you use what you have learnt in this course in the future?

Quantitative questions are closed questions which leave the respondent a limited number of choices, e.g. where you satisfied with the methodology used in the course yes/half-half/no, how many percent of what you learned will you use after the training?

Mix can be a combination of two, e.g. by adding 'if no, please let us know why you were not satisfied' in the first example.

Without getting too much into details questions should be as specific as possible and relate to a training objective in order to get most out of a questionnaire.

➡ Siniscalco, Maria Teresa; Auriat Nadia: **Questionnaire design**, Quantitative research methods in educational planning, Module 8, www.unesco.org/iiep/PDF/TR_Mods/Qu_Mod8.pdf

- Wrap-up (10 minutes): The Participants share their view on using Monitoring and Feedback in their own activities

Session Fifteen: Monitoring: Application

- After lunch again – time for an energizer (10 minutes):

Who is the leader?

Participants sit in a circle. One person volunteers to leave the room. After they leave, the rest of the group chooses a 'leader'. The leader must perform a series of actions, such as clapping, tapping a foot, etc., that are copied by the whole group. The volunteer comes back into the room, stands in the middle and tries to guess who is leading the actions. The group protects the leader by not looking at him/her. The leader must change the actions at regular intervals, without getting caught. When the volunteer spots the leader, they join the circle, and the person who was the leader leaves the room to allow the group to choose a new leader.

➤ National AIDS/HIV Alliance: **100 ways to energise groups**: Games to use in workshops, meetings and the community,

http://www.aidsalliance.org/assets/000/001/052/ene0502_Energiser_guide_eng_original.pdf?1413808298

- Individual work (30 minutes): The Participants use their logical framework from session ten or their training concept, develop a monitoring framework and determine times for feedback.

The monitoring framework should include:

- When does the monitoring happen?
- Which method is used?
- Against which aim is the outcome of the monitoring measured?
- How will the outcome of the monitoring influence the next steps of the training or course?

The feedback sessions should include

- When do they happen?
- Which method will be used?
- What questions will be asked?
- How will the outcome influence the next steps of the training or course?

- Group work: Mutual feedback on the monitoring and feedback plans (20 minutes): The Participants get together in four groups of four or five and discuss the objectives/indicators they developed
- Wrap up (30 minutes): The Participants discuss their stance on monitoring and feedback during training and if and how they intend to use it during the session.

Session Sixteen: Quality: putting it all back together

In this session the lessons learnt by the Participants will be gathered and reflected back on the concept of quality

- Plenary: Gathering what has been learnt (time needed 20 minutes, material needed 19 pages of flip-chart paper with the headers of all previous sessions and 'homework exercises', soft-tip pens)

The pages are fixed to the walls of the training venue and the Participants are asked to write down what they took from each of the exercises. If a subject has already been mentioned, Participants can endorse the finding by adding a +

- Wrap-up (10 minutes): The Trainer quickly goes through the sessions to make sure everyone is on the same page regarding what the statements mean
- Individual work (20 minutes): The Participants take their original understanding of quality from the first session and their expectations and answer the following questions:
 - Has their understanding of quality changed during the course, if yes, how?
 - Which expectations have been met during the training which have not?
 - What of the subjects covered during the training will they be using in their future activities in Adult Education?
- Plenary (20 minutes): The Participants share (*as far as they wish!*) the outcomes of their individual work
- Wrap up and farewell (20 minutes): The Trainer sums up the feedback from the previous round and gives the Participants the floor for their 'last words'

The Trainer ends the course and bids the participants farewell.

Sources and Links

- ➔ Action for the Rights of Children: **Facilitator's Toolkit:** <http://www.unhcr.org/4371d7c92.pdf>
- ➔ Allais, Stephanie Matselling: **Quality Assurance in Education,** <http://vodppl.upm.edu.my/uploads/docs/QA%20in%20education2009.pdf>
- ➔ Austrian Development Cooperation: **Guidelines for Project and Programme Evaluations,** www.oecd.org/development/evaluation/dcdndep/47069197.pdf
- ➔ Axner, Marya, Community Toolbox, Section 2, Chapter 16, **Developing Facilitation Skills,** <http://ctb.ku.edu/en/table-of-contents/leadership/group-facilitation/facilitation-skills/main>
- ➔ Bahl, Anke et al., **What does it mean to provide process-oriented training?**, in BWP Special Edition 2005, <https://www.bibb.de/veroeffentlichungen/en/publication/download/id/1081>
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