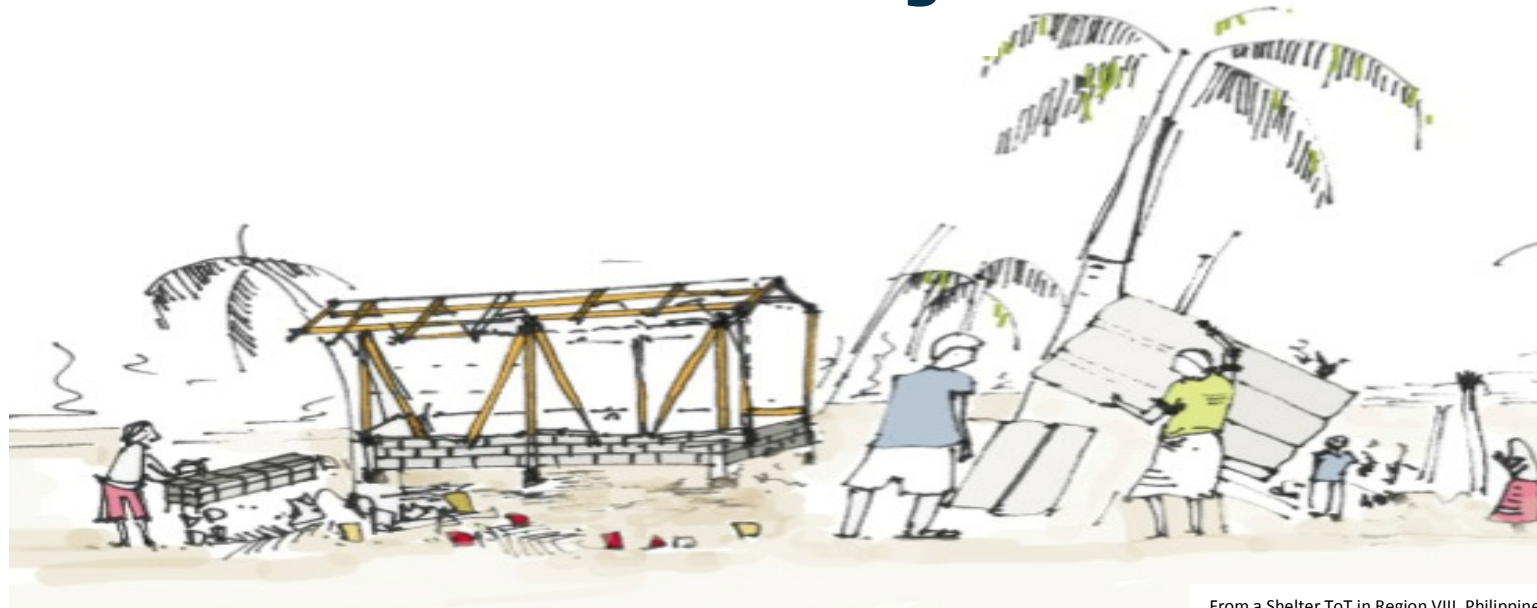


# Generic Guidelines for Training



From a Shelter ToT in Region VIII, Philippines

The following guidelines have been developed to provide practical advice to agencies undertaking training as part of post disaster shelter programs in the Typhoon Yolanda response. The advice given is drawn from analysis of the ongoing approaches and lessons learned by Shelter agencies within the Philippines Humanitarian Shelter Working Group (HSWG) combined with globally recognised and documented best practices on training in both the shelter sector and more broadly with disaster affected communities. The overarching assumption in preparing these guidelines is that *training* is undertaken with the purpose of achieving a *positive change* in competencies, knowledge, skills, traits, attitudes and abilities of those being trained. Such changes in competence are expected then to result in improved and safer temporary shelters and or permanent houses for the affected population as well as improved competencies and abilities across the sector. This document is purposefully brief to ensure simplicity, ease of application, accessibility to diverse actors, and wider dissemination. The guidelines are divided into two parts:

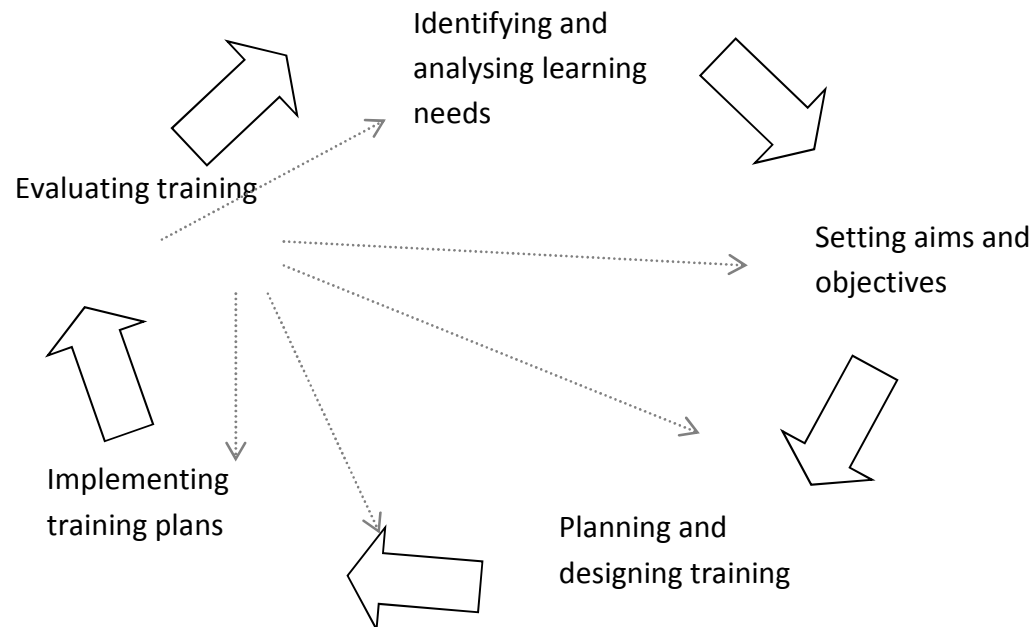
- [Introduction to the Essential of a Training Process](#)
- [Capacity Building Approaches Competency Table](#)

## ESSENTIALS OF A TRAINING PROCESS

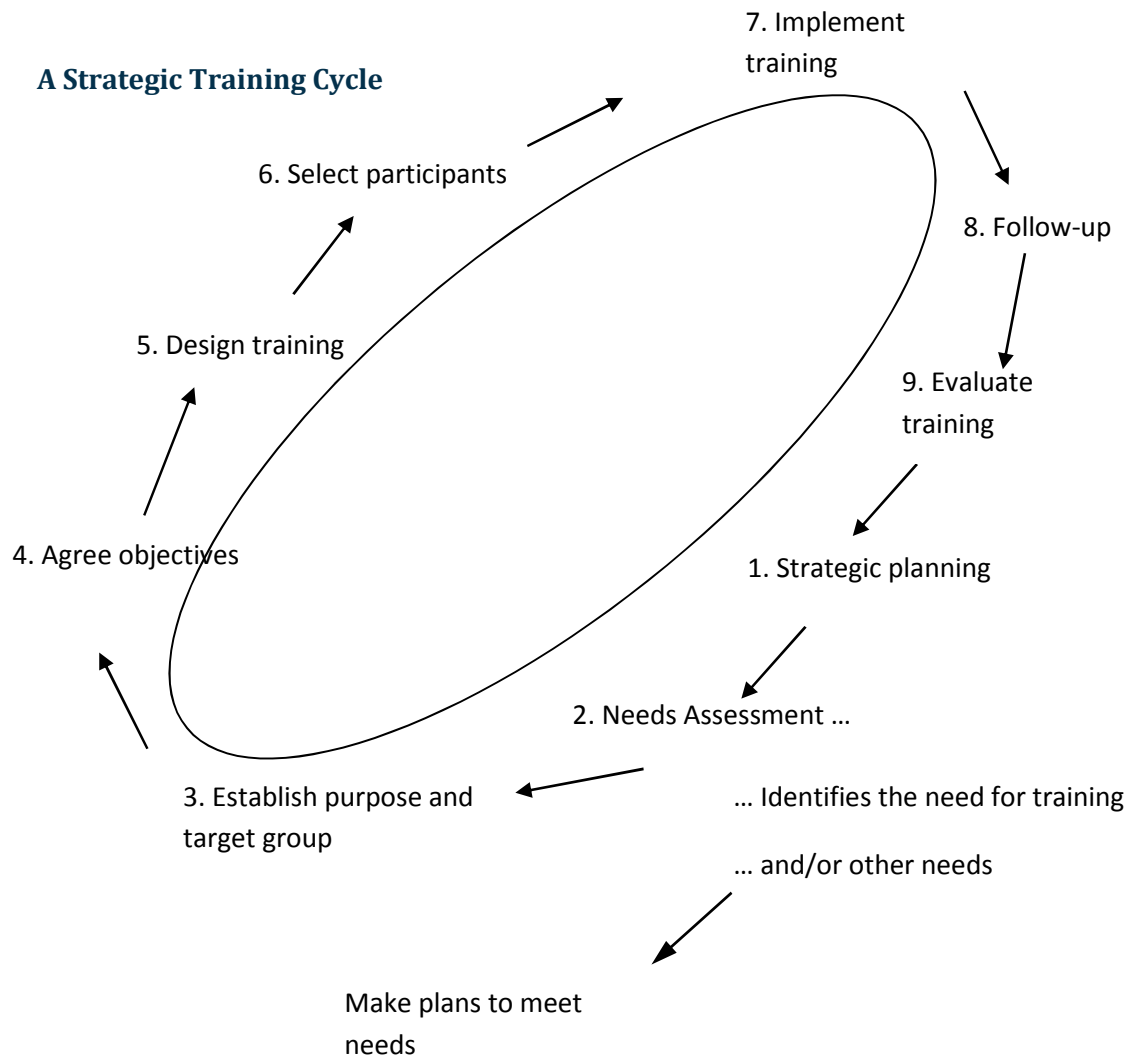
### *Training Cycle*

It is important to think of training delivery as a cyclical process rather than a one off event. The training cycle describes the process that you go through to provide a training solution. Classically involving 5 key steps; identifying needs, defining training objectives, designing the training, implementing or delivering the training and then evaluating training, prior to then re-evaluating needs, redesigning, etc

Although each stage of the cycle has its logical place in the process, all should be kept in mind throughout the process. Evaluation is a good example of this. It is important to evaluate the training at the end to see whether it has had an impact, but evaluation criteria should ideally be established at the outset. Some evaluation activities need to be built into the training design and carried out during the implementation stage. Similarly, one can gather additional information about training needs from trainees during the implementation stage. It is therefore helpful to think of the five stages in the training cycle as both forwards and backwards.



## A Strategic Training Cycle



*Stephen Blakemore / RedR*

*09/05 (3rd Revision)*

## Notes

We are used to seeing the training cycle as a five step model – identify training needs, set objectives, design training, implement and evaluate.

A broader understanding expands the conventional training cycle to show training as part of a wider, strategic process of change and not a one time or a set of unrelated events. It also recognises the importance of getting the right people on the course and following-up with them after the training.

1. Strategic planning involves all stakeholders. Training and other forms of learning support are seen as a means of achieving strategic goals.

2. Needs Assessment focuses on performance and gaps in knowledge, skill and attitude (KSA). Determine most appropriate and effective way of meeting these learning needs, including, but not limited to, training. Other needs, e.g. recruiting staff or changes to organisational structure, may also be identified.

3. Agree training purpose with client and/or key stakeholders and identify target group.

4. Set objectives to be achieved by the end of the training.

5. Design training to meet objectives. Use adult learning techniques and link training to actual work situations.

6. Select participants according to target group. Aim for people at different levels and a 'critical mass' of trainees so as to influence change.

7. Deliver training according to design and modify in response to feedback. Include action planning for participants.

8. Monitor progress on action plans and provide opportunities for further learning and support back at work.

9. Evaluate against objectives but also performance indicators arising from strategic plan. Evaluation results feed into further strategic planning.

## Learning Pyramid

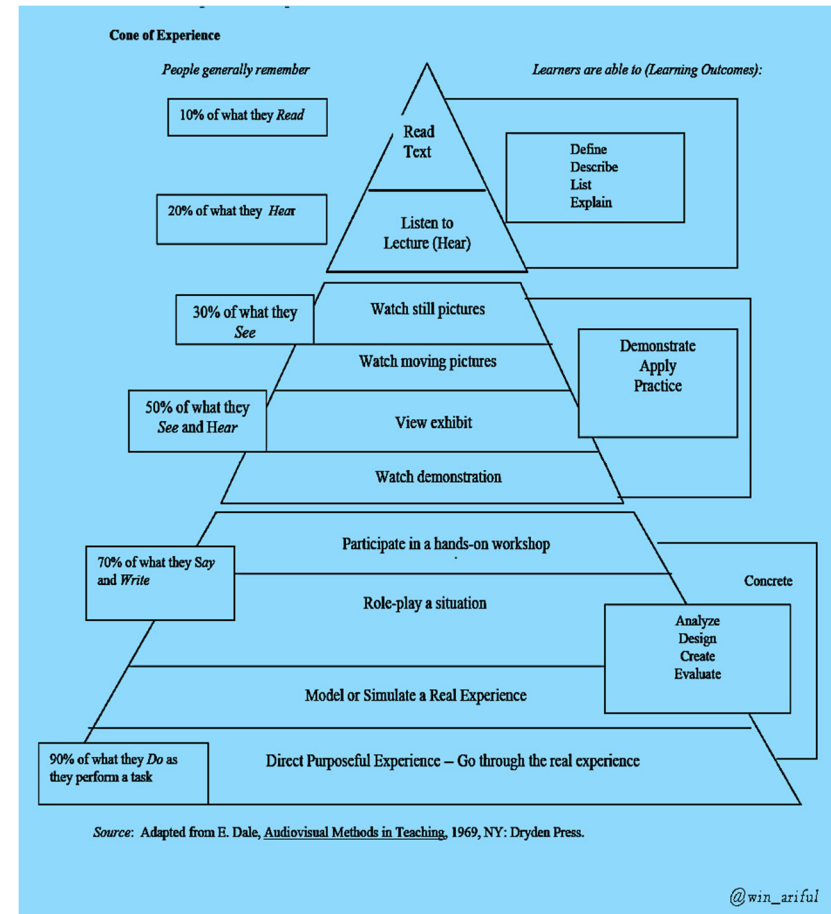
Training is about people and different people learn and engage differently. The widely referred to Edgar Dale Cone of Experience is a model that incorporates several theories related to instructional design and learning processes. During the 1960s, Edgar Dale theorized that learners retain more information by what they “do” as opposed to what is “heard”, “read” or “observed”. When choosing an instructional method it is important to remember that involving learners in the process improves knowledge retention. The diagram presented to the right is a modification of Dale’s original Cone. Essentially, the Cone shows the progression of experiences from the most concrete (at the bottom of the cone) to the most abstract (at the top of the cone).

It is not that more concrete experiences are better than more abstract ones rather that, **practical hands-on experience in a real-life context assists learners to better remember what they learn**. This is particularly true when the subjects is skills and/or actions focussed as is with most activities in the shelter sector. Within practical constraints imposed by time and resource, action based and experiential approaches achieve better outcomes as they recreate experiences closest to everyday practice. “Action-Learning” techniques engage all the senses concurrently providing a greatly increased of learning retention. Reading, listening and seeing are also valuable learning experiences but learning by “doing” generally achieves better retention faster. Use the experiential learning pyramid to design your training, its resources and activities. Ideally, find the right mix with a suggested thumb rule of 70-80% of action learning and 20-30% of more abstract learning.

For more information please refer to:

[http://www.etsu.edu/uged/etsu1000/documents/Dales\\_Cone\\_of\\_Experience.pdf](http://www.etsu.edu/uged/etsu1000/documents/Dales_Cone_of_Experience.pdf)

<http://www.educ.ualberta.ca/staff/olenka.Bilash/best%20of%20bilash/dalescone.html>



**The more senses that are engaged,  
the greater the ability to learn and remember.**

## Learning Styles

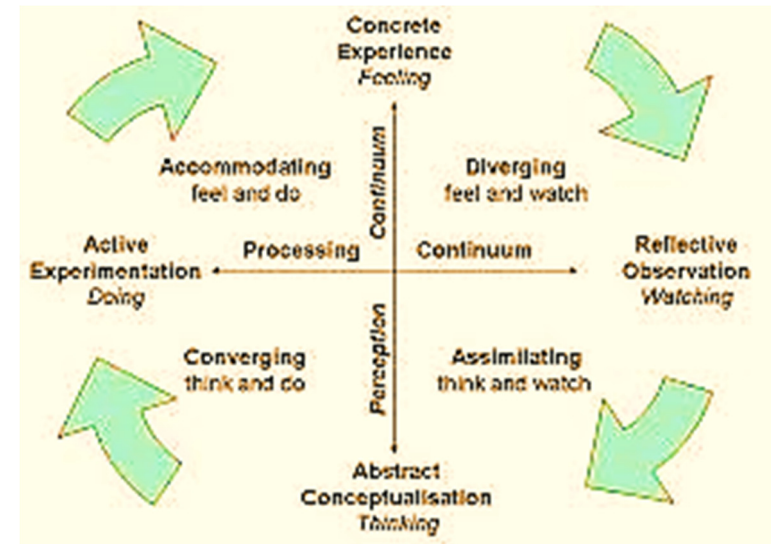
Learning is a continuous process in which people interact with their environment to acquire new knowledge, skills, ideas and abilities. Trainings should aim to create an environment which supports learning. Different individuals engage with varied learning styles which are dependent on their personal preference, subject of learning, context of learning and how they would like to use the learning. As an example, there are many ways to approach using a new cell phone; some pause and read the manual, some switch on and immediately experiment, others ask someone to show them etc. Each participant has their own preferred learning style, the more diverse the participants, the more diverse the styles will be. One commonly applied theory describes four main types of learners; Activists, Reflectors, Theorists and Pragmatists.. In simple terms, **Active learners are more prone to feel and do, while pragmatic learners will think and then do, reflective learners feel and watch and, theoretical learners think and watch.** As a facilitator it is imperative that we consider and cater for every learning style.

For skills oriented training as is common within the shelter sector, the predominant learning style is that of an active learner. Carpenters historically learn by watching other carpenters and copying what they do. Ideally then training tradespeople should focus on methods, tools, approaches that would enable participants to “feel and do” corresponding readily to the action learning aspects of Dale’s model discussed earlier. If on the other hand we are conducting training for architects or engineers we might expect a combination of more theoretical and reflective learners and hence would orient modules to allow for thinking, feeling and doing. Of course none of this is absolute and should be derived based on your learning needs assessment, participant profile, training objectives and targeted outcomes as outlined in the training cycle section above.

An assessment of learning styles can and should be done for every type of training; be it a short one of 3 hours or one of a few days or longer. As a trainer **be aware that your own learning style may affect your choice of training activity** and affect your training style. Allowing for variation within the group, though focusing primarily on the dominant style of the group be sure to include material and methods to appeal to all learning styles. To convey and sustain a message or an idea consider creative ways of allowing a combination of both reflection and action. For more information please refer to:

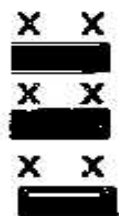
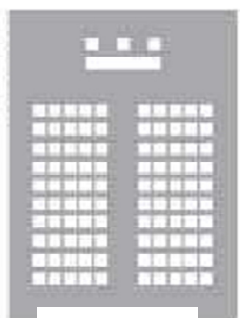
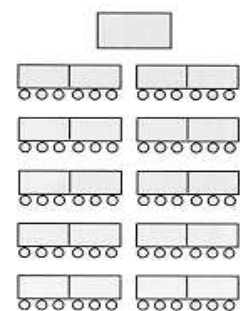
<http://www.campaign-for-learning.org.uk/aboutyourlearning/whatlearning.htm>

<http://www.peterhoney.com/> <http://www.businessballs.com>



## Learning Environment and Training Numbers

### Not Recommended for Active learners



The purpose of a training is to enable a learning process that helps the participants to assimilate the learning being offered. A training has to be able to foster open interaction particularly with adults and more so when it requires infusing skills. Towards this, different forms of training /location arrangements can be considered. Some of the ideal options of venue settings that must be followed are depicted here. When you run your training activity you must balance the subject of training, its delivery, learner needs, learning styles and, training plan to arrange the training site. ***Often the learning space that you create can make or break your training process and outcomes.*** The learning space must allow each participant space for interaction, visibility for all and, adequate acoustic.

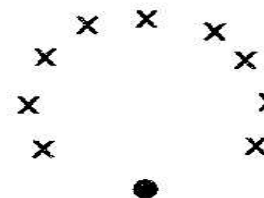
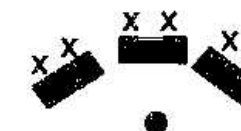
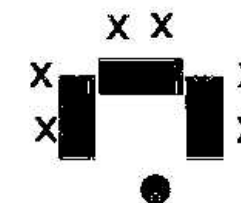
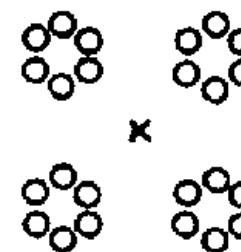
Additionally a key consideration for effective training is participant numbers. The larger the participant group the less likely you will be able to create a good learning environment and communicate effectively. This is more important with skills based training which requires practice, experiential learning and demonstrations. Even for training sessions on knowledge assimilation a small interactive group setting allowing for two way communication will have much better results. For knowledge and information based training you should not exceed 20-25 persons. For a trade and craft skills based training you should ideally reduce to 12-18 participants. For a technical training on designs and engineering 15-20 persons may be adequate.

The conditions under which you provide for training are also influential on learning outcomes. A training held in a hot, humid and huddled setting will never be effective nor will be one with too much external noise and disturbances. For community centred training sessions should be brief, well thought out and ensure appropriate timing during the day so as to not adversely impact livelihood, chores and everyday functions.

When organising a training for adults it is important to remember that participants have a right to know what they are going to learn and to know they are learning something relevant and tangibly useful to them. Often problem and task based learning works best, particularly when directly related to participants own context.

[Designing Participatory Workshops, UNHCR, 2008; Delivering Great Training, Bryan Hopkins, 2008](#)

### Recommended



## CAPACITY BUILDING APPROACHES and COMPETENCY TABLE

The Yolanda Response includes a wide variety of actors working with various categories of skilled, semi-skilled and unskilled personnel towards shelter provisioning. Most agencies are engaged in providing some form of training, formally or informally, to crafts, trades and other personnel, and communities they are working with. Towards informing this process further and providing it common structure, given here is a table on categories and competencies for capacity building. This table draws on and collates the various types of training that the HSWG encountered in Region VI, VII and VIII by different actors. This table is indicative and not exhaustive.

Personnel Category	Performance Objective	Competence Summary	Knowledge (K), Skills (S) Behaviour (B)	Duration <i>1 Day= 7hrs training</i>	Notes
<b>Crafts and Trades</b>					
<b>Unskilled Carpenters</b>	To effectively undertake semiskilled tasks in the re/building of homes by supporting carpenters, foremen and householders	Introductory Carpentry skills incorporating practice of BBS Ability to inform peers and/or clients on BBS practices	K,S	4-7 days	Training courses specifically targeted to ensure project commitments are achieved and necessary human resource trained. May be undertaken directly or in association with a recognised training agency or government service provider to ensure formal skills recognition for participants. Besides certified training courses These may include on the job learning, peer coaching and/or mentoring.
<b>Skilled Carpenters</b>	To lead on site re/construction of homes independently with householders or under supervision of technical skilled staff	Good Carpentry skills including ability to lead and guide unskilled/semi-skilled personnel on site Lead and guide householders on BBS principles Demonstrate BBS practices in their construction work	K,S,B	18-25 days	
<b>Foremen</b>	To lead and manage construction projects incorporating BBS techniques	Understand, lead, apply and demonstrate good construction techniques	K,B	15-21 days	

	Advocate for BBS practices among communities and site staff	Communicate and motivate team and householders to adopt safer construction techniques Guide and train people on BBS practices			performance based certification component should be included. May be focused on immediate shelter program or part of a longer term strategy to enhance skills within the community. Engagement with a certified training provider should be considered.
<b>Masons</b>	To be able to manufacture/select safe and durable materials of adequate quality to construct safer houses	Good masonry skills in small scale residential construction Capable of identifying, procuring and/or making materials of adequate quality	K,S	25-35 days	Masonry training could be related directly to ongoing shelter projects and/or be undertaken as a livelihood and shelter initiative. Also please refer to the row below.
<b>Permanent Trades people</b>	To provide skilled and professional construction services To consider hazard mitigation measures in their construction work	Ability to undertake their core trade/craft adequately imbuing principles of safe construction Ensuring structural mitigation techniques in their construction work Build to standards and cultural norms that are locally relevant and within building guidelines	K,S,B	8-12 weeks + Practice/ Apprenticeship	A potential blend of Livelihoods and Shelter sectors. Targeted towards equipping people with skills and resources for sustained vocations within the construction sector. Won't necessarily relate to shelter specific projects but may be a part of a livelihoods programme with shelter linkage
<b>Unskilled Workers and Volunteers</b>	To undertake supervised reconstruction work incorporating BBS techniques	Ability to implement effective and safe construction techniques Ability to use a monitoring checklist	K,S	3-5 days	Project related trainings commonly in the form of an orientation, may be extended to a short courses.

Personnel Category	Performance Objective	Competence Summary	Knowledge (K), Skills (S) Behaviour (B)	Duration 1 Day= 8hrs training	Remarks
<b>Technical and Management</b>					
<b>LGU Engineers and Government Staff</b>	To effectively design, monitor and coordinate shelter reconstruction work Advise, implement and ensure compliance on safe construction norms and guidelines	Ability to evaluate and prepare designs of shelters that ensure BBS. Understanding of adequate material quality and good practices in shelter construction. Ability to work with and support private actors on reconstruction projects Skills to communicate, negotiate and facilitate good construction practices Ability to prepare and implement a checklist on shelter reconstruction. Knowledge and understanding of DRR practices	K,S	5-7 days	Short term focussed on specific skills and knowledge components to enable and/or improve ongoing shelter work. As part of a larger and longer term plan civil society, private sector, universities and government departments should consider collaborative technical courses towards building humanitarian shelter and DRR capacities.
<b>Agency Engineers and Architects</b>	To lead, design, monitor and/or supervise shelter reconstruction work incorporating BBS techniques Advocate with peers, counterparts and government on DRR practices in sheltering To promote and train on BBS techniques with counterparts and colleagues	Have skills and knowledge to influence design and reconstruction of houses Expertise to ensure an effective and time bound implementation plan Knowledge of effective DRR practices in sheltering for typhoon and earthquake risk zones Skills to communicate effectively and clearly on good construction practices and BBS techniques.	K,S,B	5-7 days	Training courses directly pertaining to project activities, monitoring tools, resource and fund management, managing teams and implementation These could also pertain to training on advocacy, communication, training skills, integration of cross cutting issues and, strategies and tools

		Essential training skills to impart adult learning sessions			to imbue BBS messages into project operations.
<b>Project Managers</b>	<p>To efficiently manage project resources and deliver time-bound outputs</p> <p>To write proposals and design projects that ensure imbuing DRR action based on risk assessments</p> <p>To ensure compliance of minimum standards and BBS techniques</p>	<p>Essential project management skills including proposal writing</p> <p>Communication, negotiation and coordination skills to work with suppliers, counterparts and communities</p> <p>Monitoring and facilitation skills including the ability to make tools</p> <p>Motivational and leadership skills</p>	K,S	3-5 days	<p>Learning workshops organised to improve DRR components within ongoing or proposed projects both for technical designs and project planning.</p> <p>Training on targeted IEC for safer shelters and campaigns.</p>
<b>Trainers or Training Agencies</b>	<p>To impart training to different personnel on sheltering and BBS techniques</p> <p>To apply adult learning principles and participatory techniques in imparting training</p> <p>To improve the quality and nature of training delivery</p>	<p>Understanding of training as a process and role in improving project outputs</p> <p>Good understanding of adult learning principles and techniques</p> <p>Communication and facilitation skills to work with multiple learner groups</p> <p>Planning and organising skills to design and implement a training programme/event.</p> <p>Understanding of BBS, DRR and construction principles.</p>	K,S,B	7 days	<p>ToTs for sector personnel who can be a resource base for multiple levels of training particularly those for communities, frontline functionaries and semi-skilled workers.</p> <p>Also ToTs to create a cadre of master trainers for humanitarian work and shelter.</p>

Community and Householders					
Personnel Category	Performance Objective	Competence Summary	Knowledge (K), Skills (S) or Behaviour (B)	Duration 1 Day=8 hours training	Remarks
<b>House Owners</b>	To ensure that DRR measures are being incorporated in their house reconstruction/repair To promote BBS messages amongst their community	Awareness of good construction practices for safer homes Ability to use a checklist/monitoring tool on BBS implementation	K,B	1-1.5 days + Onsite support	Participatory training that are part of a process to work with affected families and communities through projects. These could and should also take the form of BCC campaigns.
<b>Teachers and Other Key Community Stakeholders</b>	To impart BBS messages and promote good construction practices in their respective communities	Communication skills to impart information on safer construction and BBS Motivation skills to help householders adopt good construction practices	K	0.5-1 day	Training to orient formal and informal key stakeholders on DRR and BBS. Ideally a part of ongoing projects but can be taken up as a separate advocacy or campaign activity. Specific modules to impart skills on knowledge transfer, behaviour change communication and facilitation.
<b>Barangay Captains</b>	To actively promote and monitor application of BBS techniques by multiple actors To support incorporation of good construction practices including BBS in their Barangays	Communication and motivation skills to enable householders to build safer homes Understanding of good construction practices including BBS messages	K,B	0.5-1 day	
<b>LGU Functionaries</b>	To ensure compliance of BBS measures in shelter reconstruction	Monitoring, facilitation and management skills to work with diverse actors Ability to use a checklist and review against the same for safer reconstruction	K	1 day	Simple orientation workshops on BBS to support and promote ongoing BBS initiatives. Short term and project oriented.