The Sphere Project

Humanitarian Charter and Minimum Standards in Disaster Response

A programme of The Steering Committee for Humanitarian Response & InterAction
in consultation with VOICE and ICVA

Lessons from the **Sphere Training of Trainers** (ToT) Courses

A reference for facilitators

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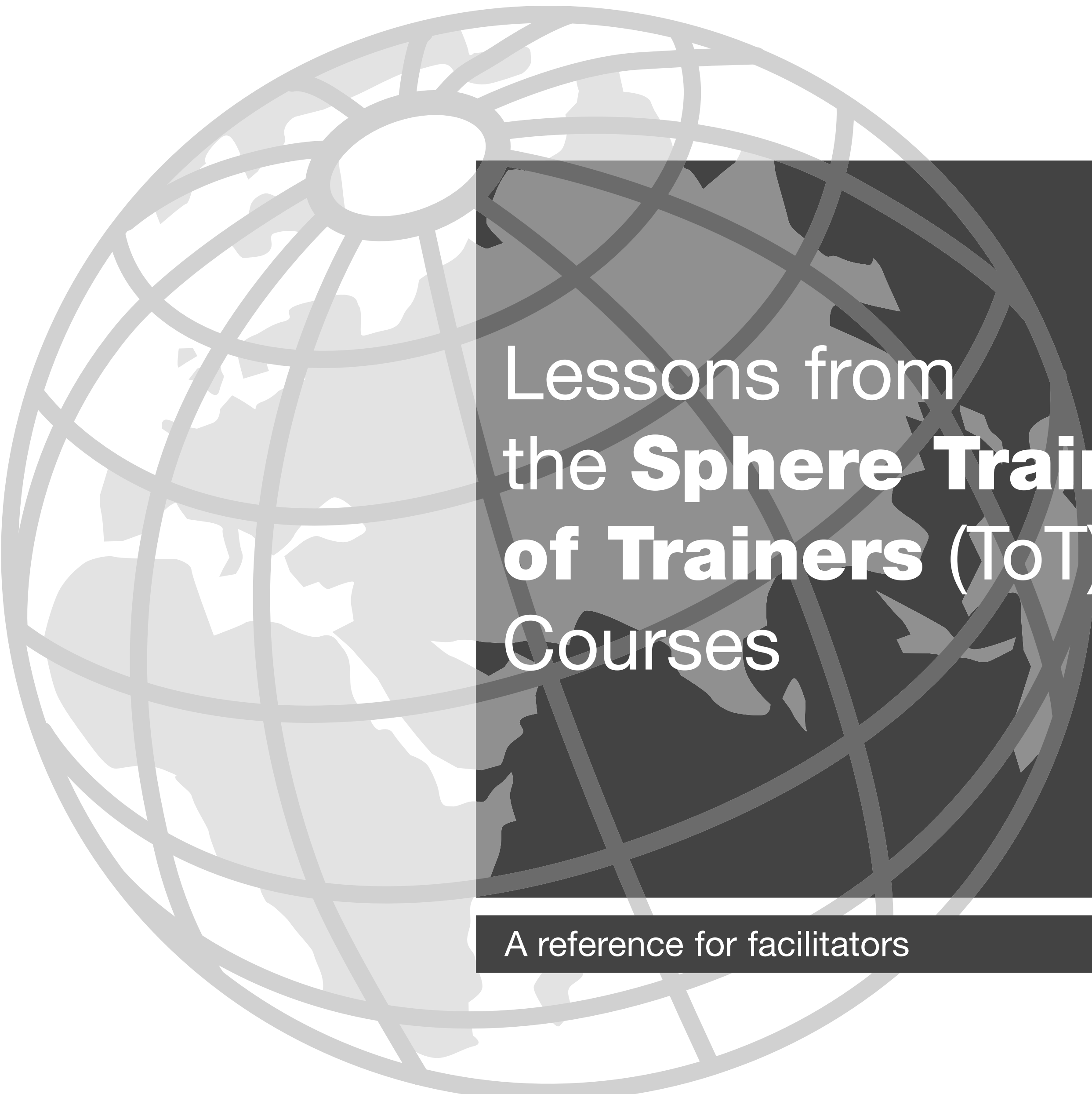
The Sphere Humanitarian Charter and Minimum Standards in Disaster Response is a remarkable international initiative aimed at improving the effectiveness and accountability of humanitarian action.

Since the preliminary edition of the Sphere handbook appeared in 1998 there has been a global system of training and dissemination. The training events held around the world have reflected changes to the handbook, considered different applications of the handbook in various field contexts and contributed to many of the current debates in the humanitarian sector. The high demand for these events led to the Sphere Project developing a Training of Trainers course in order to exponentially increase the pool of individuals who could deliver Sphere related training events.

This document is a collation of the experiences of the team who led the Sphere Training of Trainers programme and offers the reader a theoretical framework for running similar programmes. It includes a range of practical tips for training and facilitating, as well as tips on how adults learn, on creating a conducive learning environment and on utilising appropriate workshop processes.

The three authors have extensive experience of training in the humanitarian sector. This document will be useful for experienced facilitators who are involved in Sphere or generic Training of Trainers courses. It will also be useful for anyone involved in Sphere institutionalisation work within organisations.



Lessons from the **Sphere Training of Trainers** (ToT) Courses

A reference for facilitators

Sean Lowrie • Emma Jowett • Juan Sáenz

About the authors

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Contents

1. Introduction

This document. is organised into chapters that are arranged to reflect, more or less, the sequence in which a ToT course is presented. The chapters contain lessons on how to manage and deliver a ToT course. Also contained in this document are some practical exercises and sample session plans, which should give some ideas and demonstrate how the theory and philosophy of the course is applied in practice. Where relevant, chapters conclude with a few references that might be of use in expanding upon the subjects and issues described. The appendices contain additional examples.

1.1 What this document is about

Summary

- This document has been written to disseminate lessons to experienced facilitators.
- The lessons have emerged from a four-year evolutionary process of training workshops on how to apply the Sphere handbook in humanitarian work. These workshops have been run as a dissemination tool to promote the institutionalisation[1] and effectiveness of the Humanitarian Charter and Minimum Standards in Disaster Response.
- Training of Trainers (ToT) courses have been run because the demand for the above workshops has exceeded the delivery capacity of the small Sphere Project Secretariat. The courses have evolved significantly to arrive at their present format, which is based on a particular learning environment that emphasises participant-led training sessions, video coaching and critical feedback.
- There have been 10 ToT courses to date, and this document is based on lessons learnt from those courses. It is intended to inform future ToTs, both those run by the Sphere office and by others. It is also intended to inform future institutionalisation processes.

Why this document has been written

The document has three main objectives. First, it is intended that those who will be implementing a Sphere ToT in the future will benefit from the experience contained within it. It will provide space to reflect upon experience and make explicit some key lessons. At a wider level, it is hoped that the document will contribute to improving the effectiveness of those who work to facilitate learning within the humanitarian community. Finally, a significant proportion of Sphere Project funds has been spent on the Training Programme and, in the spirit of enhanced accountability, the publication of this document is a reflection of the work those funds have enabled.

[1] Indicators of Sphere institutionalisation can be found on the Sphere website (www.sphereproject.org), in the 'Sphere in Practice' section, in an annex of the September 2002 *Lessons Learned from the Piloting Process*. Put simply, it means that humanitarian organisations apply the Humanitarian Charter and Minimum Standards in their work. It can also mean that humanitarian organisations commit to upholding the principles of the Humanitarian Charter.

Who this document is for

This document is designed for those who are working to develop new humanitarian trainers. It is assumed that the user is an experienced facilitator, with prior experience in running training workshops *and* in training other trainers. Prior experience in applying the Sphere handbook, and in facilitating learning about the Sphere handbook, is also essential.

This document is also designed to help those who are involved in processes of national or regional institutionalisation of Sphere. To clarify, the word 'Sphere' represents three things: a **process** to improve the quality and accountability of humanitarian action; a **product** of this process (the Sphere handbook, which contains the Humanitarian Charter, Minimum Standards, key indicators and guidance notes); and a **commitment** to upholding the principles and values enshrined in the Humanitarian Charter and Code of Conduct. Many individuals and agencies are involved in localised Sphere processes.

Scope and limitations

This document is intended to explain the philosophy behind the ToT course and provide guidance to an appropriate degree of detail, so that experienced trainers can create a ToT event that is appropriate to their own style and to the needs of participants. It is not a 'how to' manual, nor is it a book of 'standards' for training, nor does it provide answers on how to institutionalise Sphere.

It is hoped that it contains sufficient detail to be a useful supplementary resource for experienced trainers, while balancing the recognition that every ToT course is based largely on the individual skills and approaches of the facilitators, combined in a potent mix with the experience, needs and personalities of course participants. Peer feedback is fundamental to this learning environment. Consequently, there would be little point in producing a highly detailed how-to manual, as every ToT course is unique. If you need more detail, then you should look elsewhere, such as the Sphere Training Package. There is a substantial body of existing literature on training that will cover the gaps that you might experience in this document.

It might help to understand how the document complements other Sphere Project materials and activities. The **Sphere handbook**, containing the Humanitarian Charter, Minimum Standards and key indicators, is a tool for improving the quality and accountability of disaster response. **Sphere training workshops** help humanitarian aid workers learn how to apply the Sphere handbook in their work. The **Sphere training package** contains resources to help trainers run training workshops. The training pack consists of **four training modules** (1. an introduction, 2. the Humanitarian Charter in detail, 3. the project cycle, and 4. disaster preparedness), together with a **trainer's guide**, which explains how to use the training modules, and a **CD–ROM**, which contains all of the materials plus a fully searchable electronic version of the Sphere handbook**. Sphere Training of Trainers (ToT) courses** help people learn how to use these materials and how to run a Sphere training workshop. **This document** is designed to help facilitators run a Sphere Training of Trainers course.

It is assumed that facilitators will develop their own session plans and content when running a course. The agenda included at the end of this document suggests how the ToT course can be structured, but this a suggestion only.

1.2 The background to this document

The global Sphere training strategy[2]

The training programme began in June 1999, with regional training workshops planned as a way of raising awareness about the handbook. The Sphere Project Management Committee originally conceived the training programme as a dissemination tool. In the first two years, more than 30 training workshops were delivered around the world. Eventually the workshops became three-day inter-agency events aimed at senior operational managers of NGOs, UN agencies, governments and academic institutions.

The workshops were designed to help managers learn how to apply the Sphere handbook appropriately in their daily work. This was because some debate at the time focused on the risks that might be posed for the goals of humanitarian action by a technocratic approach to the quantitative indicators contained in the handbook. In other words, there is a risk that technicians might focus on designing projects to satisfy the numbers (such as systems to deliver 15 litres of water per person per day), at the expense of understanding thoroughly the circumstances that created vulnerability in the first place and designing appropriate systems for the context. In response to these concerns, the Sphere training programme emphasised contextual understanding in using the Sphere handbook, through a project cycle approach.

Generally, the training workshops were highly rated in participant reaction evaluations. More importantly, in a limited but indicative questionnaire-based evaluation in September 2000, a sample of early workshop participants said they used the Sphere handbook in their jobs as a result of the workshop they had attended. This was a crucial assumption that underpinned the training programme. **Learning** itself was not the exclusive objective, but rather an intermediate objective to help the wider **institutionalisation** of Sphere. Rather than asking organisations or individuals to change their behaviour and adopt the Sphere Minimum Standards, the learning approach asks organisations and individuals to learn how to use the Sphere handbook as a tool, and then to learn from the experience that arises.

Training of Trainers courses evolved out of a massive demand for these training workshops. The Sphere Project Training Manager could not meet this demand alone. In response, the training programme turned to agency staff and independent consultants to implement training workshops and, over time, created the system of **Sphere workshops**, implemented by **Sphere trainers**. These trainers are created in **Sphere ToT courses**, which are delivered by experienced trainer-facilitators.

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[2] Much more information, including workshop reports and the full training package with four training modules and video, can be found on the Sphere Project website at: www.sphereproject.org.

Evolution of the Sphere ToT course

The first ToT course took place in Geneva in May 2000 and was designed for a number of training professionals who could serve as a resource for pilot agencies[3], strategic training organisations and for the Sphere Project itself. It was an experiment that generated a number of useful lessons. A rigorous and transparent 'lessons learned' approach has been employed to ensure that each subsequent ToT course has been an evolution of the previous ones. There have been ten courses to date and the latest (in September 2004) was a completely different course from the first. In keeping with the original goal of Sphere training, the purpose of the ToT course was to provide 'learning facilitators' to help humanitarian agencies and others to adopt and use Sphere effectively. These people need to be able to explain the relevance and utility of the Sphere handbook and approach across many levels within their own agencies.

Characteristics of the Sphere ToT course

Content delivered in the ToT course has consisted of three distinct themes. One theme is drawn from the Sphere Training Package: an introduction; the Humanitarian Charter; applying the Sphere handbook in the project cycle and in disaster preparedness; and the technical content of the handbook. The second theme includes adult learning principles, assessing learning needs, designing a learning event, training methods, facilitation methods, coaching, and managing difficulties in workshops. As a third theme, some courses have explored organisational issues.

The primary characteristic of the eight-day residential course is that it is inter-agency and takes the perspective of the wider humanitarian community, not that of a single agency. Second, participants train each other and learn through practice– an important way of maximising learning and retention. Third, the course establishes a safe learning environment, where participants are able to take risks and give each other critical feedback. In a way, a temporary culture is established, in which constructive peer feedback is established as a norm. Trainers are not responsible for personal growth, but this happens anyway if the course is well run, and it is often possible to observe participants 'blossom'. Fourth, the course mixes together different cultures, organisational mandates and experiences, with a resulting discussion of values that enables a better understanding of our common humanity.

The goal of the Sphere ToT course has evolved to be as follows: 'Participants will become change agents to promote learning and apply Sphere as a tool for improving the quality and accountability of humanitarian action.'

The objectives in meeting that goal are that participants will be able to:

- understand how to apply the Humanitarian Charter and standards in humanitarian action
- be able to utilise the Sphere handbook as a tool to promote dialogue on humanitarianism
- carry out a training workshop on Sphere (preferably within three months, although this could also be a condition for attending the course)
- be able to facilitate learning within humanitarian agencies.

[3] At the time, 20 humanitarian organisations were involved in piloting Sphere in practice

2. Before the course

2.1 Participant recruitment

Summary

- The quality of the ToT course depends mainly on those attending as participants.
- For ToTs to date, significant efforts have been made to communicate and advertise the course, in order to increase the pool of candidates from which participants are selected.
- The criteria for selection are based largely on the candidate's potential to disseminate the Sphere handbook after the course and act as a change agent for his or her organisation, as well as the contribution that he or she might make to the course learning environment.

General considerations

Training events should be custom-designed, and this design must be based on the learning needs of a target audience. Ensuring that the appropriate target audience attends the learning event is important and challenging work. It calls for raising awareness that the course exists, providing the conditions that will encourage people to attend, and making it in their interest to attend.

How the Sphere Project has done it and why

Advertising, recruitment, screening and selection are critical for the success of the Sphere ToT learning environment. For the courses that have been held to date, no effort was spared to ensure that these activities were conducted thoroughly and professionally. Planning started at least six months in advance, with advertising starting immediately afterwards. Selection criteria were based on both the potential of the individual to contribute to the institutionalisation of Sphere, and on their potential contribution to the learning environment during the course itself. There is usually pressure to maximise the number of participants in a ToT course. Experience has identified that a good learning environment is created with 24 participants, 3 facilitators, and one course administrator.

Advertising

Various tactics were employed to reach the target audience and each course was advertised as widely as possible. The media used included website bulletin boards such as Reliefweb and Alertnet, e-mail newsletters such as *Codep, Humanitarian Times*, *Drum Beat and Aidworker.net* and the Sphere Project website and newsletter. The Project's Management Committee disseminated announcements through internal mass e-mails. Informal mechanisms were also used, such as asking ToT 'graduates' to nominate others who might benefit from the course. This last strategy, while running the risk of encouraging exclusivity, was consciously used in an attempt to target training consultants from the developing world who were not being reached through any of the communication channels described above.

Application procedure

Acceptance to the course is based on an application, which in turn is based on formal and agreed selection criteria. For courses held to date, the numbers of applications in relation to successful candidates has been on average about 3:1. The large number of applicants has enabled the Sphere Project to select only those participants who have met the selection criteria.

Selection criteria

The selection criteria have been:

- operational humanitarian experience of ideally two years
- training experience as a facilitator of at least five workshops
- proficiency in the language of instruction of the ToT course (i.e. able to train others in that language)
- number of other languages in which the candidate is able to run workshops
- working location in an area where a concentration of humanitarian workers exists
- mandate and support (moral and financial) from the candidate's organisation to conduct future training
- experience with, and current extent of, Sphere institutionalisation work
- plans for future Sphere training or institutionalisation work
- checking of references on communication abilities, including diplomacy and cross-cultural skills.

ToT course participants should represent the diversity that exists in the humanitarian community, and a realistic learning environment for humanitarians is also highly diverse. Consequently, an overriding consideration has been to achieve a balance along three axes of diversity: gender, nationality and organisation. While this kind of calculation is never perfect, many of the courses have achieved a 50-50 men-women balance. Moreover, tremendous efforts have been made to ensure that no one organisation or ethnicity has been represented disproportionately.

Diversity also includes consideration of how the skills, attitude and experience of the individual will contribute to the course. Will their perspective add to its diversity? Is their perspective important for others to understand? Do they have a particular skill-set that is not yet present in the course? Might they be in a position to mentor others?

The contribution of the individual or their organisation to the institutionalisation of Sphere is an additional overriding consideration. Do they belong to a key stakeholder group in the humanitarian system? Do they work in a context where the use of the Sphere handbook is limited? Do they have a mandate from their organisation to apply what they learn on the course? Will their organisation support them on their return from the course?

In cases where there have been too many suitable candidates, an additional criterion has been included that assesses the leveraging potential of the candidate and their organisation. Leveraging has been defined as the number of humanitarian workers the individual might come into contact with over the course of a year. How much training do they do? Are they in a position to influence their organisation? Are they in a position to influence other organisations? Evidently this criterion favours middle- to senior-level staff in international organisations. As a result, proportionately more Anglo-Saxons have participated in ToT courses than are represented in the humanitarian community as a whole, if one takes into account absolute numbers of national staff and local NGOs.[4] With limited resources, and a limited number of ToT courses, the Sphere Project has had to make judgements about the greatest possible impact that training funds could have on the wider dissemination of the Minimum Standards.

Course fee

Participation in the course costs close to US$1,000, which represents a subsidy of approximately 50 per cent, excluding international transport and participants' salaries. It is a well-known if somewhat strange phenomenon that managers respect training courses that cost money more than they do 'free' training. If a manager has to allocate budgets, or if the individual has to fund-raise to attend the course, a greater chance of return on investment and a greater training impact is generally achieved.

Challenges to the recruitment of the target audience

The main problem experienced to date has been that the target audience (in particular field-based trainers) is difficult to reach. Raising awareness of courses has been hampered by a lack of communications infrastructure in the humanitarian community. Also, the process of candidate selection has sometimes been perceived as biased because the Sphere Project has been seen to 'owe' people slots on the course – for example, agencies on the Management Committee have nominated one participant for each course (although those nominated had also to meet the selection criteria). Important humanitarian organisations yet to take a policy position on the Sphere Project, or project donors, have also been invited to send participants.

These political criteria are useful for the dissemination of Sphere (and in meeting the ToT course goals), but they make it difficult for the facilitators of the course to meet the needs of all participants, in particular when some of the participants are not there to learn about training. Finally, some managers do not understand the purpose of the ToT course, and have nominated participants as a 'reward' rather than as an investment for their organisation. This is problematic because the individual will not necessarily be able to use the learning from the course when they return to their work context.

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[4] A fully searchable database of ToT participants, can be found on the Sphere website.

2.2 Adult learning theory

Summary

- The following section describes the rationale behind the inclusion within the ToT of elements related to adult learning principles and theoretical frameworks.
- It includes some advice on how to design and facilitate this part of the ToT, provides examples of content, refers the ToT facilitator to relevant references and websites, and shares some lessons learned on this particular topic.
- Four conceptual models are described here: andragogy, experiential learning, accelerated learning and the pedagogy of hope.

Why is this subject included in the ToT?

The purpose of including the topic of adult learning theory in a ToT is to provide a brief, but profound, overview of key adult learning principles, together with the characteristics of a learning environment that should underpin the design and delivery of any humanitarian learning event. Through this session, participants realise (or are reminded) that adult learning is not only a craft, but also an art and a science that is supported by a great deal of academic and scientific thinking.

Experience in previous Sphere ToTs demonstrates that 50 per cent of participants have been exposed previously to a large amount of adult learning theory. However, the great majority of this 50 per cent do not use these principles in their humanitarian training, and very seldom analyse them from a humanitarian perspective. The other 50 per cent are surprised to learn how much theory there is on the subject. If the session is successful, it will leave participants with a desire to explore the topic further by themselves. Experience has demonstrated that it is better to concentrate on a few theoretical elements and explore them in depth, rather than to analyse a wide range of topics superficially.

Sample learning objectives

Some of the learning objectives that have proved useful in the past include the following.

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

- confidently explain three adult learning principles and illustrate each of them with an example
- list two main differences between adult learning and non-adult learning
- distinguish between traditional learning and accelerated learning
- describe Kolb’s experiential learning cycle, illustrating the four steps with an example from everyday life
- list the types of learning preferences described by Honey and Mumford
- justify the value of experiential learning as a powerful approach to humanitarian training programmes
- identify five elements that make a learning environment conducive to learning
- explain how the facilitator/instructor affects the learning event.

Obviously, not all of the above can be covered in a 90-minute session. Experience has shown that a 90-minute session allows for in-depth exploration of a maximum of four of these points, and ideally only three of them. This is assuming that an 'experiential learning'[5] approach will be adopted when dealing with the objectives and content for the session. Bear in mind that including these frameworks will oblige trainers to design and deliver learning sessions using these principles and concepts. The following are a few of the conceptual frameworks and key authors to have been used in previous ToTs.

Andragogy[6]

This concept has been used in previous Sphere ToTs within the theoretical framework developed by Malcolm Knowles. Its humanistic approach (influenced by Carl Rogers' approach to facilitation), concern with empowerment, informal learning and emphasis on responsibility, as well as self-direction of the learner, make it an appropriate framework for humanitarian learning in general and for Sphere training in particular. Some of the andragogy-related elements that have proved successful and have been welcomed in previous ToTs include the following:

- definition of andragogy and how it differs from pedagogy
- the meaning of 'self-direction' and 'taking responsibility' for learning, and how they relate to the principles of the Humanitarian Charter
- analysis of some of the basic principles: for example, adults need to know 'why'; they need to learn experientially; they learn better if they approach learning as a problem-solving activity; learning must have immediate value to the learner
- the techniques of andragogy.

The essence of Knowles's theory can be found in his 1950 book *Informal Adult Education*, a reading of which can be complemented with his 1970 book (re-edited in 1980), *The Modern Practice of Adult Education. Andragogy versus Pedagogy*, published by Prentice Hall and the Cambridge University Press. Some useful internet sites on andragogy include the following:

www.andragogy.net This site examines the origins of the term
http://www.nl.edu/academics/cas/ace/resources/malcolmknowles.cfm This site offers a biography of Knowles and explains some of the basic principles of andragogy and its techniques. It takes a balanced view that includes criticism of Knowles.
http://www.newhorizons.org/future/Creating_the_Future/crfut_knowles.html Includes an article written by Knowles himself, including his 'dream' of continuous adult learning.
http://agelesslearner.com/intros/andragogy.html This site offers a useful description of the differences between pedagogy and andragogy, with links to more in-depth articles.

[5] Learning through experience.
[6] Andragogy is used here to describe adult learning, while pedagogy is used to describe child learning.

Experiential learning

The research of David Kolb provides a conceptual framework that has proved useful for Sphere ToTs, as it speaks to the humanitarian practitioner who needs to have 'grounded' experience beneath the academic theory. It also offers a useful model of learning from experience, and is used in designing effective training sessions. The elements that have been included in previous ToTs include the following:

- the concept of experiential learning as it relates to humanitarian learning
- the experiential learning cycle and its four stages
- how to design a learning event using Kolb's cycle as a guide.

The following are useful references to consult when designing your session on this topic:

http://www.learningfromexperience.com David Kolb's website, which includes his CV, a link to his learning style questionnaire (which can be purchased) and articles on the subject.
http://reviewing.co.uk/research/experiential.learning.htm This site contains an extremely useful compendium of articles on experiential learning, as well as critiques of this approach.
http://www.dmu.ac.uk/~jamesa/learning/experien.htm This site explains the experiential learning cycle and provides a correlation with Honey and Mumford's typology of learners.

The essence of Kolb's theory can be found in: Kolb, D. (1984), *Experiential Learning: Experience as the Source of Learning and Development*. Englewood Cliffs, N.J.: Prentice.

Accelerated learning (AL)

Colin Rose, Lou Rousell and Dave Meier are a few of the AL gurus. They all work on the basic principle that information can be assimilated more effectively by using a series of techniques supported by neuroscience. Previous ToTs have included some of the following elements related to this theory:

- positive learning environment
- multiple intelligences and intake styles
- contextual learning
- learning as a creative process, as opposed to a mere 'intake' process
- the influence of the facilitator in the learning environment.

The following are useful references:
http://www.alcenter.com This is the website of the Center for Accelerated Learning. It includes an explanation of what AL is, links to some very useful articles on learning, and an extensive bibliography on the subject. It also includes a list of recommended music for learning, and provides useful tips.

Two books that contain the essence of AL, with exercises suitable for ToTs, are:
Meier, Dave (2000), *The Accelerated Learning Handbook*, McGraw-Hill
Russell, Lou (1999), *The Accelerated Learning Field Book*, Pfeiffer.

Pedagogy of hope

This relates to the work of Paulo Freire, the Brazilian educator whose contribution to adult education is very relevant to humanitarianism. Freire's work, and particularly his concepts of hope (see Sphere handbook p.29, guidance note 3), empowerment, critical analysis of context, redefining relations of power in the classroom and problem-solving in a learning environment, are concepts that are closely related to the principles and values embedded in the Humanitarian Charter and Minimum Standards.

Freire's vast conceptual framework provides an interesting opportunity to enrich and build upon the previously described conceptual frameworks when dealing with the topic of adult education in a Sphere ToT. Some useful references include:

http://www.paulofreire.org (Portuguese-language)
http://www.paulofreireinstitute.org/ss_freire-eng.html (English-language)

Freire, P. and A. M. A. Freire (1994), *Pedagogy of Hope: Reliving Pedagogy of the Oppressed*, New York: Continuum.

Conclusions

It will depend on individual facilitators to identify the most appropriate and suitable content for their workshops. This chapter provides a variety of options and references, but it is the learning need and context and the experience of the facilitator that will dictate the content. The common thread running through the theories included here could be argued to reflect the principles of the Humanitarian Charter, namely: 1) the learner takes responsibility for his or her own learning; 2) there is a well-designed effort to ensure respect for the learner's needs and preferences; 3) participation goes hand-in-hand with learner-centred approaches; and 4) learning is liberating and empowering, and an integral component of life with dignity.

3. Approaches/methods

3.1 Team-building and group dynamics

Summary

- The following section describes what has been experienced in previous Sphere ToTs in relation to group processes and group dynamics.
- It uses Tuckman's five stages of group dynamics (Forming, Storming, Norming, Performing, Adjourning) and provides some lessons learned from previous ToTs on how to intentionally guide these dynamics in a positive way.
- It also provides some practical examples of how to help participants take responsibility for their own learning and for the course environment.

Participants attending a standard Sphere ToT will be required to invest at least 10 days of their lives in it. This includes eight days of residential training, plus at least two days' travel to and from the venue, plus arrival one day before the event itself begins. This is a considerable amount of time, and enough to generate group dynamics that should be carefully monitored and intentionally guided by the facilitation team. The training team (who will be asked to invest 13 days of their time) will be part of this 'community' and will generate dynamics of their own.

Forming and storming the facilitation team

Experience confirms the importance of communication between the training team members well in advance of the course starting, and the importance of maintaining it throughout the course. Joint preparation and clear definition of tasks are important ways to enhance communication both prior to the preparatory meeting and during the course itself. It is strongly recommended that the facilitation team meets for at least two full days at the venue prior to starting the course.

The preparatory meeting aims to achieve the following results in the two days it lasts:

- The members of the training team meet each other and have an opportunity to get acquainted.
- Trust is built and confidence established amongst the training team members.
- The ground rules and the specific roles and responsibilities for the week are established.
- Facilitators not familiar with the programme are brought on-board as regards the methods, content and rationale behind the design of the ToT course, allowing for clarification of questions related to its content and process.
- An in-depth analysis is undertaken of the profile of each of the participants, whereby the training team creates a 'virtual group', anticipating possible dynamics and identifying mechanisms to deal with any problems they might imply. This is done (if time permits) by reviewing each of the application forms and commenting on people already known to facilitators. Admittedly, this is a subjective exercise, but it has proved useful in the past.

The following is a list of activities conducted during previous ToT preparatory meetings:

- review goals and objectives for the workshop
- explain rationale behind the ToT course, its programme and agenda
- provide an overview of the content and process for each session
- hold bilateral meetings between instructors working together on specific blocks
- establish ‘rules of engagement’ for the training team
- establish mechanisms for conflict prevention and resolution
- conduct non-structured and informal team-building activities
- build in time for individual work and preparation of content for each block
- divide roles and responsibilities for each day and each block during the week
- review administrative support and logistics arrangements
- establish coaching mechanisms within the training team
- check the availability of materials for each block
- analyse participants’ profiles.

Norming the facilitation team

Basic principles have been agreed by the training teams in previous ToTs:

- A safe learning environment is created, to be ‘owned’ by the group, but carefully monitored by the facilitation team at all times.
- Every activity conducted should be participant-centred and should follow the adult learning principles outlined in chapter 2.
- The training team works as a team and not as a collection of individuals. Roles and responsibilities are mutually agreed and adhered to.
- Mechanisms for conflict resolution are clear to all and agreed prior to starting the course.
- There is an overall leader, a daily leader and a block leader. The daily leader is responsible for the learning environment of the day, the block leader for the content and environment of the session, while the lead facilitator oversees the whole course.

Forming and norming the group of participants

The group of participants in a ToT course can be constituted before it actually meets at the training venue. This can be done by sending each participant a list of the others and encouraging them to contact each other prior to the course. Also, sending participants a message with their pre-course assignment[7] is a way of making them feel they are already part of a group. Some cultures are more receptive than others to this approach, so it is up to the facilitator’s judgement as to what extent it is encouraged.

Once the group arrives at the venue, the first two blocks of the course should be devoted entirely to creating the necessary conditions for individuals to feel safe, obtain the necessary initial guidance they require, recognise themselves as a group, and recognise that they will be expected to take ownership of the learning environment and the learning process. Special attention should be given to the way in which participants are welcomed: for example, a note or a small welcome gift in each person’s room has proved very useful in previous ToTs.

[7] For more explanation on this, refer to the section on learning and retention, as well as Appendix 2.

Here are some examples of activities conducted during the first two blocks of previous ToTs:

- welcome cocktail, coupled with an ice-breaker
- hopes and expectations, including what participants will contribute to help realise them
- agreed ground rules for the week (norming through a participatory process)
- establishment of committees that will take care of specific aspects of the course: for example: a social committee that will take charge of extra-curricular events not included in the agenda; a health committee with health professionals as members, which will be responsible for health-related issues and which will liaise with the training team in case of medical evacuation (gender balance is particularly important for this committee); a news committee in charge of posting daily world events and keeping the group informed of news items relevant to them; etc.
- clarification of administrative arrangements
- a names game
- introduction of the training team, including admin support staff
- description of venue and surroundings
- exposure of all members of the training team to the group, which implies that each member should play one specific role during the opening block
- establishment of 'focus groups' (see section 3.2 on workshop processes).

Experience has shown that no matter how well the first two blocks are conducted, the group will truly consolidate as a group only after day two of the ToT programme.

Storming within the group of participants

Invariably there will be competition and conflict amongst participants in any ToT: this is normal and should be expected. However, facilitators have a responsibility to ensure that the storming becomes a positive force that helps 'performing', and not a negative force that prevents it. Here are some mechanisms that have proved useful in previous ToTs:

a) identify potential conflict within the group and discuss it during the facilitators' meeting on the first day
b) assign a facilitator to speak privately to the person(s) concerned during a break or meal
c) ask members of the focus group to deal with the situation during their meeting
d) identify participants who could 'defuse' tensions due to their informal roles (opinion leaders, elders, etc.) and ask them if they would be willing to do so if necessary
e) if the storming becomes a hindrance to the learning environment, deal with it during a plenary session, following the adult learning principles outlined in chapter 2.

Performing together

Experience has shown that in an eight-day ToT, performing as a group will peak on days three and five (day four is a half-day off, so participants will most likely have an intense and focused morning and then will use the afternoon for further consolidation of the group or as individual space for relaxation). By the third day the group is normally well established, norms are agreed, and the safe learning environment is consolidated. By this time, the facilitation team is also well acquainted and identified with the group. This is the time when the training team needs to ensure that performing (good energy, collaboration, joint problem-solving, respectful environment, motivation, etc.) is maintained and that complacency does not set in, particularly over the last two days of the programme.

Adjourning the group

The standard agenda incorporates space for an adequate and planned conclusion of the ToT. Experience has demonstrated that a Sphere ToT demands an enormous emotional investment (because of various factors: the residential environment, the critical feedback, the performance on video etc.) on the part of participants (and facilitators), and that group dynamics and interpersonal relations can become intense at various stages of the course. Therefore an adequate closure is recommended. Some closure activities conducted in the past, and which have proved useful, include the following:

- formal evaluation of the course
- a pre-closure social event on the penultimate day (e.g. closing dinner)
- formal recognition of participants' achievement (e.g. certificate ceremony)
- space to say personal goodbyes and establish contacts for the future
- planning the last blocks of the course in a way that allows people to consolidate alliances
- 'Talking Stick', 'Listening Circle' or similar closure and a 'free speaking space' ceremony.

Adjourning the facilitation team

Experience has shown the value of having a 'post mortem' session for the facilitation team. On previous courses, this has been conducted one day after the workshop has closed and participants have departed. Some of the activities to conduct during the meeting include:

- compilations of lessons learned
- evaluation and analysis, block by block
- review and evaluation of administrative arrangements
- an opportunity for personal and professional farewells amongst the team
- celebration of success.

References and resources

http://www.gmu.edu/student/csl/5stages.html This site includes a detailed description of the five stages of groups, as described by Tuckman.

http://www.accel-team.com/work_groups/informal_grps_01.html This site provides detailed description of how informal groups are formed and led, how they perform, how they communicate and how their dynamics can be monitored. It offers both an HR and a management perspective.

Tuckman, B. and M. Jensen (1977), 'Stages of Small Group Development'. *Group and Organizational Studies*, 2, 419-427.

3.2 Processes to support and accelerate learning

Summary

- The Sphere ToT contains a variety of processes that are designed to improve learning.[8]
- These processes can be invisible yet contribute significantly to an effective learning environment. They can also be a visible and major aspect of the course.
- Such processes provide the mechanisms to hear feedback, contribute to the learning environment, assess learning and evaluate the training.
- In particular, participant-led sessions have been used effectively to encourage immediate learning during the ToT course.
- Nine different workshop processes are covered here.

Workshops and learning

Some debate exists in the humanitarian community about the best methods for learning, and some people question the efficacy of training workshops. In ordinary Sphere training workshops, learning is defined at its most simple level as behaviour change, and behaviour is defined as **the application of the Sphere handbook in humanitarian work**. If a person attends a Sphere training workshop and they learn how to apply the handbook, and as a result they begin to apply the handbook in their job, it could be argued that they have **learned** because their behaviour has changed.

Sphere training workshops are also concerned with influencing attitudes towards humanitarianism and enhancing individual skills to deliver humanitarian action. The difficulty is that such changes in attitude are difficult to measure or to attribute solely to a workshop. In the ToT courses, learning is about an even more complex set of behaviours, surrounding the art of facilitating Sphere training workshops.

What are workshop processes?[9]

Workshop processes are the parts of the workshop that are necessary to communicate with participants, but which do not deliver the content of the workshop. The training team is responsible for initiating all the workshop processes, including encouraging and supporting participants to carry them out. These processes contribute to the smooth and professional running of the workshop, and are essential in creating and maintaining a safe, dynamic, flexible and responsive learning space. They help to keep participants' learning needs at the centre of the training, provide opportunities for the training team to assess progress and receive feedback, and are essential in facilitating group dynamics. In short, they are the key, but often unseen, component of a successful workshop.

[8] See section 2.2 on adult learning theory for more on accelerated learning.
[9] This section assumes 3 facilitators and 24 participants.

1. The process of starting the workshop

The tone of the workshop is set from the very first moment the participants arrive at the venue and not, as many trainers assume, from the moment they first stand in front of the gathered group and say 'hello'. A welcome note will make participants feel valued and will also provide clarity on what they are expected to do and when they should do it.

The Sphere ToT endeavours, where conditions are favourable, to hold a drinks party the evening before the formal training programme begins. The purpose of this party is to set an informal and friendly tone from the outset and also, more importantly, to give members of the group plenty of time to 'ritually sniff' as many people as possible. The 'sniffing' begins when they play the passport game.[10] During the party, time is also given to eliciting expectations for the course and setting the ground rules. If done properly, the tone of the first evening can contribute to ground rules or norms that aim to encourage friendship and mutual trust.

The following day, during the first session, all the initial rituals are completed and it is possible to start immediately with the videotaped introductions and then to go straight into content. An additional idea for introductions involves asking participants to introduce themselves while holding a lighted match: when the match has burned down they have to stop – a very good way to have fun and to keep introductions short.

Another idea for a starting process is as follows. Put flipchart sheets on the walls with a question on each, and with a paper bag stuck to the paper. Questions can be serious or fun: for example, 'What do you hope to achieve during this workshop?' 'What have you left behind to come to this workshop?' 'What might hinder you from learning?' 'How would you like others to behave?' 'What colour is your organisation and why?' 'What smell is your organisation and why?' Participants should write answers to the questions on pieces of paper, and put them in the bags. When everyone has arrived and written their answers, these can be collated onto a single flipchart.

2. Participant-led sessions

Participant-led sessions were introduced into the Sphere ToT for several reasons. First, they provide an effective method for participants to learn some of the Sphere content that they will have to deliver when they facilitate Sphere training workshops themselves. Second, they provide opportunities for participants to practise. In addition, they provide an opportunity for peer-to-peer feedback and exchange of experiences to occur. The value of participant-led sessions can be summarised by the old saying: *'The best way to learn is to teach someone else.'*

Participant-led sessions create quite a different workshop from a passive classroom discussion. They should be carefully introduced and managed in the course, as they can create a high degree of anxiety. They also cause participants to prepare outside of the formal classroom times, sometimes late into the night, which can be counterproductive. The most important aspect of facilitating participant-led sessions is to make them safe, so participants

[10] See Appendix 3 for an example.

feel that they are not being judged but rather feel supported. Two types of participant-led sessions are used. The first, called a 'mini-session', is prepared by participants before attending the course, and delivered individually in a short (ten-minute) small group setting early in the course. The second, called a 'maxi-session' is more significant: participants take turns to essentially run the course over two days.

Mini-sessions

The course pre-assignment includes asking participants to prepare a ten-minute presentation or exercise that they will have to deliver The mini-session is where this exercise is used. As it occurs early in the course, the session contains a high degree of risk for participants. It is done in the safety of a smaller group, in which relatively intimate feedback can be given in confidence. The mini-sessions have been run as follows:[11]

- Participants are given their instructions the evening before they are due to deliver the mini-session. Remind the group of their pre-course assignment and check that everybody has the resources they need. Offer help or support if required.
- The exercise starts with splitting the plenary into three evenly-sized groups. The groups should be deliberately constructed to create a balance of gender and linguistic ability (and degree of nervousness). Each trainer runs one of the three groups.
- Each group gathers in a pre-allocated room. The trainer should quickly establish the speaking order, obtain a volunteer time-keeper and create a rotating roster so that different participants lead the feedback on each session.
- The roster should also address the question of who will operate the video camera. On past courses it has been useful to rotate this task, and for those who have just completed their mini-session to do the filming for the next person.
- Once the set-up is complete, rotate through each individual mini-session. Once started, things tend to settle into a formula, which can be calming for those who are nervous.
- Each mini-session starts with the individual identifying the context for their presentation, and instructing the other participants on the roles they should play.
- The individual then delivers his or her session in front of the group. It is helpful to stick to exactly ten minutes in duration.
- When they have finished, the individual asks the group for feedback on specific areas. The lead observer gives feedback first, and others may offer their own observations.
- The trainer should conclude the feedback before moving on to the next participant, to ensure that the participant is feeling positive about the experience

Be careful in the mini-session about critical feedback. The training team must be very aware of the amount of critical feedback they want provided in the mini-sessions, as this will set the benchmark for the remainder of the course. A common pitfall is that participants will be overly diplomatic with each other, and not have the courage to clearly provide both positive and negative feedback on their colleagues' performance. Trainers must lead by example in the

[11] See Appendix 6 for more resources for mini-sessions.

mini-session and create a safe environment of critical friendship that will exist for the remainder of the course. This is challenging but essential.

Maxi-sessions

Participants work in teams of three, both to prepare and to deliver the maxi-sessions. Each maxi-session is 90 minutes long, comprising of 70 minutes' training and 20 minutes' feedback from the plenary group. Points to think about in running the maxi-sessions include the following.

- Approximately two days before the maxi-sessions, post a list of possible session titles. It is important to introduce the topics in plenty of time, so that participants can prepare comfortably. Teams of three sign up to the sessions, and prepare together (preparation adds to the learning process).
- The teams prepare their session plan from the modules and optional exercises in the Sphere training package, or based on their own ideas.
- It is essential that the teams review their session plans with a trainer prior to their maxi-session. This allows for some coaching, and also allows the trainer to vet the session and to ensure that its approach to the Sphere handbook is not technocratic. Ensure that the sessions build on each other so that the two days are a logical and informative learning event. This coaching in design of the maxi-session is a very powerful opportunity, and the trainer should not hesitate to ask teams to focus their objectives or entirely reconsider their plans.
- Be aware of possible conflict within the teams. Teams of three are used partially to ensure that conflict can be managed internally.
- During the day of maxi-sessions, one trainer should act as 'master of ceremonies' to provide a narrative that links the sessions together in a logical flow.
- Usually one of the three trainers takes the lead in facilitating a maxi-session. This involves finding a volunteer camera operator, and obtaining the three video cassettes (one video cassette per person on the team)
- The lead trainer should provide no other assistance unless requested. Ensure the team sets up the room and their visual aids, and starts the maxi-session in their own way.
- When each team has completed its maxi-session, the lead trainer then facilitates the 20 minutes' feedback. Start by showing a few seconds of the video, asking the team to self-assess, then ask them if they want feedback from the plenary. Facilitate feedback from as many participants as possible.
- Trainers should contribute feedback but should not have the last word. This contributes to a positive learning environment
- While facilitating this 20-minute process, it is important to ensure that the group gives feedback in a respectful and honest way. Trainers will often find themselves in a position of coaching participants to give feedback to their peers more effectively. Note that some feedback will be given informally and privately in the coffee breaks and at meals.
- Each maxi-session should be preceded by at least a 30-minute break to allow the teams to get properly organised.

3. Focus groups

Focus groups represent an evaluation and learning process that serves a variety of purposes. The trainers receive daily feedback, and can adapt things immediately if appropriate. Secondly, focus groups contribute to an effective learning environment, as participants feel they have some control over the workshop process. Also, they can reinforce learning and peer support as the groups review the day's topics. Finally, it is a useful learning exercise for participants to critique the training methodology being used and, as the trainers always respond to the daily feedback, understand why things are done the way they are.

The focus groups are formed during the introductory session on day one. The groups can be formed arbitrarily, from the tables at which participants happen to sit, or in four random groups. Focus groups can also be pre-formed, with each group representing the diversity of the entire course. The process of focus group formation/norming occurs as follows:

- The groups are asked to complete a task, such as introductions or defining the expectations of the group as a whole.
- Alternatively, training content can be used, e.g. what is the difference between a facilitator and a trainer, or in what ways can the Sphere handbook be applied in the humanitarian sector?
- Groups are then asked to think of a name and a logo for their focus group and draw it on a flipchart. These are then the focus groups for the rest of the week.

The focus groups meet at the end of each day to discuss two questions: What is going well? What needs improving? Feedback should be constructive, and based on majority opinion. Discussion should concentrate on content, methodology, trainer style, course materials and facilities. The process of giving feedback is as follows:

- Having had their discussion, groups elect one person to give their feedback to the training team at the workshop navigation meeting, which occurs at the end of each day.
- This role alternates between members of the group, so that everyone in the group has at least one turn at giving feedback.
- The trainers and support staff attend the navigation meetings, where the feedback is given without discussion and questions are asked only for clarification.
- When the focus group representatives have given their groups' feedback and left the meeting, the training team discusses any amendments they need to make to the programme and any response they wish to make to the feedback.
- One member of the training team reports the focus groups' feedback and the training team's response to the plenary group first thing the following morning.

4. Reviewing

Reviewing is a method used to accelerate learning, and can involve simply reminding participants about what has been covered. It also involves providing space for participants to make connections and reflect upon what they are learning in the course. Reviewing acknowledges that adult learning requires a conscious approach to remembering. Two methods have been used. First, in the evening, focus groups meet to critique the day, which inevitably results in the content being reviewed. Alternatively, in the morning, a 30-minute session reviews the previous day's content.

Reviewing can occur more frequently than once in the morning. Some trainers prefer to use frequent five-minute reviews instead. Reviewing must be participatory to be effective. Usually the morning review follows a simple method, which starts with obtaining as much participation as possible in identifying the topics covered the previous day. Once the topics have been identified, some space for reflection is provided.

For the first couple of days, the training team should lead this morning review. An example method is the **snowball fight**. Start with a plenary brainstorm (perhaps using a 'shotgun' method to ensure everyone is awake), to identify every topic covered the previous day. Then instruct everyone to take a blank sheet of paper and write one thing that they learned from the previous day's topics. Once completed, instruct everyone to scrunch up their pieces of paper and to throw them at one another in a mock snowball fight. After some time, instruct everyone to find a snowball, unwrap it and read it out loud to the plenary. Once everyone has read his or hers, facilitate a general discussion.

Alternatively, the morning review can be split into two parts. The first part is about the content (i.e. the application of the Sphere handbook, or the theory covered), and the second part can review the methods that the trainers used in delivering the content. This method has proved quite useful in encouraging conversations about effective learning methods and techniques.

Past ToT courses have encouraged participants to lead the morning reviews, usually from the third day on. This provides an additional opportunity for some to practice facilitation skills, and helps to establish an effective participatory learning environment, where participants take ownership over some of the course processes. It also serves to make reviewing and the emphasis on memory and retention more overt and conscious. This has influenced past ToT participants to adopt similar reviewing methods in their own training courses.

5. Open spaces and the parking lot

'Open space' sessions are scheduled with the specific intent of allowing participants the possibility to direct their own learning and share experiences related to Sphere or to training in general. Throughout the ToT process, the responsibility of participants for their own learning is emphasised, and the open spaces provide an opportunity to reinforce this. Open spaces are explained at the start of the course and a flipchart is posted where participants sign up to talk about an issue they think the group will find interesting.

Open spaces have also been used for further preparation for sessions and for the **'parking lot'**. Inevitably, as the course progresses, issues are raised that are either contentious or do not fit easily with the scheduled content. The open space provides the opportunity for participants to raise issues and questions they might have, either about Sphere or about training.

Previous evaluations have indicated that participants have a great appreciation of hearing from peers about their experiences, and this has led to the inclusion of at least two such sessions in every Sphere ToT.

6. Informal space and conversation

Training teams have always acknowledged the importance of maintaining informal conversation time with participants during breaks and in the evenings. This can provide an excellent opportunity to hear how participants feel the course is going. It can also provide opportunities for enhancing learning by encouraging conversations that are undirected, non-linear and usually highly relevant to the needs of the participants.

These opportunities can be formally constructed through the **discussion board**, where topics of interest are listed and informal discussion groups are formed, usually at lunch breaks or in other free-time slots. **Social committees,** responsible for evening games or events are another example.

7. Small group work

Small group work can be one of the most rewarding learning activities, because it allows more in-depth discussion and is helpful for those participants who find it difficult to speak out in the plenary group. On the Sphere ToT, group work provides an additional opportunity for individuals to present in front of the plenary group, and to practise facilitation skills in the small group. For this reason, groups are always asked to select a facilitator for their discussion, as well as a rapporteur who will present the group's key points to plenary. Some examples of ways to form groups are given below.

Numbering

People call out or are assigned numbers in sequence, up to the number of groups needed (e.g. for four groups, 1, 2, 3, 4; 1, 2, 3, 4, etc.). Then all the 1s form one group, the 2s another, and so on. Alternatively, use letters of the alphabet. Be clear after you have split the groups where each group should work.

Birthday line-up

Ask the participants to form a line in order of birthday date (make it clear that they only have to reveal the month and the day, and not the year). The January birthdays should be at the front, with December at the rear. When the line is complete, the trainer asks each participant in turn their birthday date, corrects any mistakes, and then counts off however many are needed in each group.

The ship is sinking

Clear a large space, climb onto a chair and explain that you are the captain of a ship and the ship is sinking. Ask everyone to clap and repeat after you 'The ship is sinking, the ship is sinking'. Explain that the only way for people to save themselves is to jump into a lifeboat containing a precise number of people – you will call out the number required. Start the chorus and then yell out a number e.g. eight. Everybody should now rush to find seven other people to form a lifeboat. This should provoke much noise and laughter. Repeat a few times with different numbers until you feel the group is ready to stop, and then yell out the number you want for small group work.

The world-famous Mexican shoe exercise

This is a good way to allow groups to self-select. Explain that shoes have many different characteristics, e.g. colour, shape, height of heel, laces, etc. Ask participants to find two other people with similar shoes to their own to form groups of three. Allow a few minutes of wandering before checking that everyone has a group.

8. Monitoring and evaluation

Training can be evaluated at different levels. In 1959, Donald L. Kirkpatrick presented a model of training evaluation that comprised four levels. Forty-five years later, Kirkpatrick's approach to training evaluation remains widely used and quoted. The levels are as follows:

- **Level 1 (Reactions)** looks at participant satisfaction with the training and their immediate reactions to it.
- **Level 2 (Learning)** looks at what has been learnt. What do participants know now that they didn't know before the training? What new skills have they mastered?
- **Level 3 (Behaviour)** looks at what participants are doing differently as a result of the training. How has what was learned on the course been transferred to their everyday life and work?
- **Level 4 (Results)** looks at the impact that the training has had on participants' performance and the community in which they are working.

The Sphere ToT can only claim to evaluate on the first two levels, but has evolved some effective means for doing so. The most sophisticated device to measure level one (reactions) is the use of **focus groups**.

Evaluation form

In addition, an **evaluation form** is distributed at the start of the course to measure participants' reactions to individual sessions. This is distributed at the beginning so that participants have the opportunity to complete it while sessions are still fresh in their minds. The form is explained to them during the introduction to the course and they are invited to make constructive comments. There is a final section that participants complete at the end of the course, which asks for more general comments on what they feel they have learned.

Questioning and observation

For level two, there are two main ways of evaluating learning, apart from asking participants for their perceptions. **Questioning** is used during sessions and group activities. There is also **observation** of the mini- and maxi-sessions. This is the main opportunity for the training team to ascertain where improvements are being made in individuals' performance. In the closing session, participants are invited to assess what they can do now compared with what they could not do at the beginning of the course, what they know now, and what new perceptions and insights they have gained from the week.

It is more difficult to follow up level three evaluation (how workplace performance has improved as a result of the training) and level four evaluation (how workplace results have contributed to its overall impact) after the Sphere workshop. This is due to a recognised difficulty in isolating the effects of training from other factors that may affect performance, a lack of baseline data on pre-training performance, a lack of funding for personnel to track results after the training and, finally, a fundamental difficulty in measuring impact, an area in which the humanitarian sector is notoriously weak.

9. Blended learning

Learning and retention are also encouraged through 'blended learning'.[12] A pre-assignment is given to all participants a couple of weeks prior to the course. This is to ensure that those attending have a common basic level of understanding about the content, structure and application of the Sphere handbook. It also ensures that the time spent in the workshop is effective, as the participant's learning begins beforehand.[13]

Blended learning can also include a post-workshop assignment that encourages the participant to practise what was learned during the workshop. The ToT course has experimented with asking participants to write short case studies about how the Sphere handbook has been applied in their organisation. Such case studies would both consolidate participants' learning from the ToT course and contribute to the learning of others who did not attend. In fact, however, very few participants have written case studies, even when incentives have been offered.

References and resources

UNHCR (2003), *Learning Policy and Guidelines: Parameters for the Enhancement of Staff Development in UNHCR*, Division of Human Resources Management

Greenaway, Roger, *The Active Reviewing Guide*. http://www.reviewing.co.uk

Kline, Nancy (1999), *Time to Think: Listening to Ignite the Human Mind*, Octopus Publishing.

[12] Workshops are blended with pre-workshop assignments to introduce topics that will be covered, and with post-workshop assignments to help apply and practise the learning.
[13] See Appendix 2 for an example of a pre-workshop assignment.

3.3 Learning through the use of video

Summary

- Videoing participants as they run a training session has proved a very effective way of identifying competence and areas for improvement.
- A staged approach is required in order for learning to occur.
- An initial baseline should be established.
- Other people's perceptions of performance gives additional value to the learning.
- A coach should work with the participant throughout the process.

Why 'learning through video'?

Video provides the opportunity for individuals to watch and assess their own competence and decide how to improve it. Learners will generally become more responsible in the learning process when they are actively participating in that process, experimenting and judging the efficacy of changes made. A person's perception of how he or she appears to others is often very different from the way that other people actually perceive him or her. It is therefore important for individuals to have an opportunity to test their perceptions with peers.

Why a staged approach is used

A trained cameraperson can be hired for the ToT, or filming may be done by one of the trainers or by one of the participants, if they have the necessary skills. One difficulty with video is that participants are often shy of the process. This is normally a natural shyness in front of the camera, but it can affect an individual's performance. This is a false impediment and so it is important to try and remove the fear of the camera as soon as possible. This is essential also in building a sense of a 'safe' learning environment. Each participant has three opportunities to perform on camera, and to review their performance with their coach (a member of the training team or another participant). In this way, the learner is able to test theories, experiment and test again. This use of video offers learners a genuine chance to experience Kolb's learning cycle[14] in a safe environment.

Stage one: self-introductions

During the first morning, every participant gives a one-minute introduction of themselves to the plenary group. This introduction is filmed, with the aim being simply to accustom participants to performing in front of the camera. The video sessions need to be introduced with care but, however it is done, trainers will always feel a frisson of apprehension pass through the group at the mere mention of the word 'video'. One way of measuring the level of nervousness is to count the number of questions asked by the group – the more questions there are, the greater the fear. It is important to be matter-of-fact and simply announce what is going to happen. Each person is assigned their own personal video cassette, upon which all

[14] See chapter 2 on adult learning for more explanation.

three stages are recorded. The first stage then also becomes a baseline, against which the participant can measure his or her progress.

Stage two: mini-sessions

The second stage involves a longer 10-minute mini-session on an aspect of Sphere. These mini-sessions are done in small groups. At the end of each person's session, a short segment of the video is shown, to help the participant 'decompress' before the feedback begins. The participant is asked first to self-assess in front of the others, then to invite peer feedback on specific things they want to know about. As far as possible, control is given to the learner. The learner is also advised to view the video after a few hours have elapsed, either on their own or with a peer/coach.

Stage three: maxi-sessions

After a few days, participants have had an opportunity to become more familiar with adult learning principles, with the content of the Sphere handbook and with one another. The third stage aims to consolidate learning, as participants can combine newly gained knowledge and self-awareness of training skills to deliver a more substantive session, in the form of a content-specific 70-minute maxi-session, in teams of three. This stage also aims to provide a platform for deciding on personal development needs after the course. As with the mini-sessions, the video is used in two ways. First, a small segment is shown at the end of the session to help the participant decompress and to transform from 'performer' to 'critical learner'. Second, the video is used later by the participant as a tool for more in-depth review and learning.

Review and the use of coaches

It is essential that participants take time before departure from the ToT to view their video cassette with a trainer and anyone else from whom they would value feedback. It is the training team's responsibility to encourage and support the viewing process, even though some participants may find it excruciating. It should be emphasised that the value of video is in the watching. As well as identifying areas on which they would like to continue to work, it is important for participants to identify areas of existing competence. Their analysis will contribute to their own personal development plan.

Using coaches is probably the single most important aspect of learning through video. Coaches can provide neutral and constructive feedback and offer participants a different perspective from their own, through watching the video and making comments in a framework specified by the participant. Coaches should be selected by the individual, and may be members of the training team or other participants. This promotes equality in the relationship and makes it more likely that the individual will value the feedback offered.

Before viewing, the coach asks what specific points the participant would like comments on. For example, would they like comments on their body language, on their tone of voice or on their choice of training methodology? This is important as it allows the participant to keep control of their learning, and also curbs over-enthusiastic comments from other viewers. The participant and coach then watch the video together, with either party pausing when they want to ask for or provide feedback. It is important that, when the viewing has finished, there is a discussion about what changes the individual will make next time they try a similar exercise.

What you will need

You will need the following resources to run the video sessions effectively:

- **one video camera** throughout the week for use in the introductions, the mini-sessions and the maxi-sessions

- **two additional video cameras** for the mini-sessions

- **three video cassette players with monitors** throughout the week (this means that at least three people can be watching a video at the same time in any free periods)

- **one cameraperson** – where cost is not prohibitive, it is useful to hire a skilled camera operator. However, this is not essential, and often participants will enjoy taking it in turns to film. Alternatively, a member of the training team can operate the camera.

- **one video cassette for each participant**. Unfortunately, due to cost considerations, normally only one camera is available to film the maxi-sessions. This means that cassettes have to be swapped in and out of the camera, depending on which participant is training. This can be very distracting and can also mean that a participant does not have a full record of their performance. The problem can be solved by using a digital camera or by using a video cassette copying facility: this allows a single cassette to be used, which is then copied for the other participants.

4. Combining content and approach

4.1 Assessing learning needs

Summary

- Effective training is based on a thorough learning needs assessment.
- This is an important subject because the ‘graduate’ of the ToT will be designing learning events in the future.
- Learning needs assessments are fundamental to designing learning events that will be focused on the participant’s learning needs, not on what the trainer thinks the participants learning needs are.
- This section outlines the content delivered in the course.

Conducting a Sphere learning needs assessment

The learning needs assessment (LNA) taught on the Sphere ToT is designed to be used within the context of an organisation and is concerned with learning needs in relation to the application of the Sphere handbook.

A pragmatic and informal approach is taken towards LNAs. Many of the participants who attend the ToT course will be running Sphere training as an additional responsibility within their usual role in their organisation. Most are given little extra time to fulfil these additional duties, and the approach to LNAs aims to recognise this and avoid being too onerous. An analogy is drawn with field-based initial needs assessments, with the emphasis on achieving a balance between accuracy and efficient use of time .

General considerations

These are some general points to consider before carrying out a learning needs assessment.

- **What** needs to be done? An analysis of the current situation as regards the knowledge, skills and attitudes of staff within an organisation in relation to the Sphere handbook.
- **Who** needs to do it? Can it be done by an internal or an external person? Either way, familiarity with both the Sphere handbook and the sector requirements is essential.
- **Why** does it need to be done? To enable appropriate learning opportunities to be planned and to provide a justification for training and development.
- **How** will it be done? Through a mixture of methods, including observation, questionnaires, interviews, performance appraisals and product examination.
- **When** will it be done? Before planned learning events.
- **Where** will it be done? In the organisation and/or the field.
- **Have** we done it? Carry out an evaluation of whether the aims and objectives of the learning event have been achieved, through assessment and review.

What should an LNA aim to measure?

An LNA endeavours to link the way in which the organisation perceives the Sphere handbook should be applied internally with current levels of staff knowledge, skills and attitude. An LNA in this context assumes that the organisation believes using the Sphere handbook would contribute towards its overall goals and lead to improved job performance. The LNA measures the 'gap' between the required knowledge, skills and attitude and their current levels. The results of the LNA should inform both the choice of learning event and its content. The LNA should be clear in distinguishing between organisational issues and learning needs, and should endeavour to link an organisation's goals with improved job performance The LNA should also aim to measure the context for the organisation: i.e. what direction does the organisation want to go in, what are its priorities, what is its learning culture and what are its management needs? Culturally, it is important to ascertain the language of the organisation and define its values and style, and to consider how these may (or may not) relate to the values defined in the Sphere handbook.

When should you do an LNA?

An LNA needs to be carried out prior to any planned learning event. If Sphere is being introduced to the organisation and it is apparent that it is a fresh concept for staff, then initial training will probably not need an LNA, as the core content has already been defined in the Sphere training materials.

How to assess learning needs

The 'gap' can be measured in the following ways.

Observation. This can be observation of a finished product, such as a proposal or monitoring plan that references the Sphere handbook. As it is difficult to observe individual performance in relation to the Sphere handbook (what would you observe?), visiting a project that has been constructed using Sphere standards and indicators would be a good indication of how well an organisation or individual was implementing the handbook.

Questioning. This is an excellent way to assess an individual's level of knowledge about Sphere, and some sample questions can be found in Appendix 1. Questions can either be given to an individual in written format or asked orally, depending on time constraints. If an interview is carried out, then the knowledge questions can be included in the interview. If large numbers of people need to be reached, then a mail-out of written questions will be more effective.

Questionnaires. Questionnaires are useful when large numbers of staff need to be interviewed. However, as most people are already drowning under a daily deluge of information, be sure to keep questionnaires short and easy to answer. Questionnaires can be sent out to random members of staff in a large organisation, or can be systematically distributed. Most importantly, questions should be worded to provide data that can be analysed, which means that while some open-ended questions are acceptable, it helps to include questions which need a 'yes or no' answer or which provide answers with a numerical value.

Interviews. These can be formal or informal, but should always be structured, meaning that each person interviewed is asked the same core set of questions. While additional questions can be asked, depending on the experience of the staff member, it is important that the core questions allow the interviews to be analysed. Sample interview questions are included in Appendix 1. Interviews are especially useful for gauging attitudes. Focus group discussions are a useful way of interviewing a large number of staff. A quick LNA might include an informal interview with two staff members per level of the organisation (e.g. the board, senior management, middle management and the field team). The outcomes from this should distinguish between management issues and learning priorities.

Secondary information. This could include an examination of job descriptions, records of performance appraisal interviews or training records, and interpretation of information about key elements.

Self-assessment. This can be a useful way of measuring skills levels, although performance criteria must be available to the individual in order for them to make a judgement. This method has the added benefit of helping individuals feel as though they ‘own’ the learning event that ensues, as they have been directly involved in establishing what should be included in it.

Designing a learning event

The results of the LNA will contribute to choosing what type of learning event is appropriate. Budget and location will also be contributing factors. Assuming that budget is no hindrance, the numbers of staff with learning needs will have a big influence on the type of event chosen. If large numbers of staff have learning needs in the same area, then a training course would probably be an efficient way of imparting the learning. If the learning needs that emerge are unique to individuals or to small groups of staff, then work-based learning activities such as coaching, mentoring or action learning sets might be more suitable.

Regardless of the type of event chosen, learning aims and objectives need to be established. Aims are broad statements of intent for the trainer. On their own they are of little use, as they are open to interpretation and are difficult to assess. Their importance lies in the fact that they are the first stage in setting the learning objectives and informing potential participants of the content and methodology of the learning event.

An objective is a specific statement of what a participant should be able to demonstrate in terms of skills, knowledge or attitude at the end of a learning activity. Each objective should state what the participant will achieve, and this outcome should be measurable. An objective should also be relevant to the aim of the course and attainable in the given time. Objectives relate the content of the training to the knowledge and skills needs identified in the LNA. They make the planning and implementation of learning activities focused, effective and efficient and, finally, they act as indicators by which learning programmes can be monitored and evaluated.

4.2 Workshops as opportunities to apply the principles of the Humanitarian Charter

Summary

- This section describes some lessons on how Sphere ToT facilitators can facilitate learning about the Humanitarian Charter by creating a learning environment in which participants actually experience these principles and values in action.
- It presents a set of recommended principles and standards, derived from experience. These elements are neither exhaustive nor all-inclusive, but are included here as a reference and as a possible guide for designing, implementing and monitoring a Sphere ToT course.
- A few examples are included of real situations that have occurred during ToTs, in order to illustrate the points made.

Training and the principles of the Humanitarian Charter

Whose responsibility is it anyway? The roles and responsibilities outlined in the Humanitarian Charter (on p.18 of the Sphere handbook) clearly indicate that, as humanitarians, we recognise that people affected by disasters have the capacity to meet their own needs. By analogy, a Sphere facilitator must recognise that participants in a learning event are responsible for their own learning throughout the event.

Life with dignity, a respectful learning environment. Any learning environment should be safe, and this implies that participants feel respected, valued and trusted. Humanitarian training must strive at all times to create and maintain a learning environment in which individuals can exercise participation, explore new topics, debate, disagree, work collaboratively and resolve conflict, in a respectful way. This applies equally to interaction between participants. Particular attention is to be paid to social events and extra-curricular activities that are part of the programme.

> **'Get rid of her, please!'** During a ToT course, a participant was exhibiting particularly difficult behaviour on day one. On the first night, the focus group to which she belonged gave her a clear message that she was being disruptive to the learning environment. However, she chose to take no notice and persisted in her behaviour on day two. At the end of that day, a couple of members of the focus group asked one of the facilitators to get rid of this participant. The facilitator chose to task the focus group with trying to resolve the situation itself, and discussed with the rest of the training team strategies for monitoring the participant and her effect on the learning environment. The training team also gave the participant an implicit and non-threatening message that it was responsible for the learning environment and was monitoring it carefully. By the third day, the focus group had taken care of the situation, without the need for the facilitators to get directly involved (as is sometimes needed).

Principle of non-discrimination and respect for diversity. In order to be consistent with these principles, the facilitators will design and implement the course so that it honours learning preferences, cultural backgrounds, diverse learning needs, different levels of experience and diverging views. Participants who provide minority and/or controversial views will be treated in the same way that minorities are treated by humanitarians. Diversity will not only be tolerated, but will be respected and celebrated. This extends to the composition of the facilitating team.

Quality and accountability. Sphere is, among other things, an expression of commitment towards quality and accountability in humanitarian practice. This includes humanitarian training of good quality. As stated on p.26 of the handbook, quality depends on the skills, abilities, knowledge and commitment of humanitarians – in this case, of humanitarian trainers. When designing and implementing Sphere training, ensure always that your learning event possesses the quality that you would like to see in humanitarian programmes. Accountability can be exercised throughout the event in a number of ways. For example, state learning objectives both at the beginning of a session and at the end, and provide a detailed explanation of why some were not met; make changes to the programme and agenda in a participatory and transparent way; and when you don't know something, accept the fact and provide alternatives for finding that information, either during the learning event or afterwards.

The right to participation. When dealing with participants in a humanitarian learning event, it may be useful to reread Common Standard 1 on Participation and use some of the indicators and guidance notes for the design and implementation of the learning programme. For example, guidance note 3 on p.29 of the handbook states that participation in the programme (in this case the training programme) should reinforce people's sense of hope and dignity. Ask yourself, 'How am I going to make this happen?'

Training and the Common Standards

A clear understanding of the context. This is a mantra repeated over and over throughout the handbook, and it also applies to learning. Here are some questions that have been used during previous ToTs: What is the background of each of the participants? What is the prevailing cultural context in which the training is taking place? What is the gender balance and what consequences may this have? What are the expectations of participants? Their hopes, their fears? Inter-agency or single agency? What are the learning needs? Who stated these learning needs? Are there particular sensitivities in the context? etc.

Cross-cultural awareness, anyone? The facilitator had planned the start of the day with the idea of making the participants feel part of a close group and realise that they shared common ground, despite their different nationalities and backgrounds. Of the 25 participants, three (one woman and two men) had pointed out on day one that they had specific dietary needs due to their Muslim beliefs, and during a discussion over coffee two had said they were Buddhists. The meeting was taking place in three different languages, and most participants had never met each other before. For this reason, the facilitator started the second day by saying: 'Good morning, everyone please stand up, turn to your neighbour and give them a back massage. Make them feel good!'. Some of the participants were visibly uncomfortable with this, and it took them some time to re-engage in the meeting.

Vulnerable people are identified and supported. This is another principle of humanitarian practice that can be implemented within a learning environment. Here are some questions that could help in this task: Does any participant have special needs? Are any of the participants disabled? Do we have emergency contacts for participants in case of emergency? Are there lactating mothers present in the group? Are there people from cultures that will make them a minority in the group? What special arrangements have been made for participants in terms of cultural and religious practices? etc.

People's capacities should be identified. As well as identifying vulnerabilities prior to and during the course, people's capacities should also be identified and built upon. In the past, this has been one of the main objectives of the workshop's opening event and of the session in which participants introduce themselves in front of the group and a video camera.

Participation in assessment, monitoring and evaluation. Through the creation of committees and focus groups (see chapter 3), and through open dialogue with the facilitation team, participants are encouraged to actively participate in the monitoring and evaluation of the learning programme. Experience has shown that both formal and informal mechanisms are required in order for participants to do this effectively. This reflects Common Standard 1, guidance note 2 (p.29), which states: 'Mechanisms should be established to allow people to comment on the programme e.g. by means of public meetings or via community-based organisations.'

Code of Conduct and principles of behaviour

Use power intentionally and positively. Humanitarian trainers recognise the need to respect human dignity and acknowledge human capacities, and understand the importance of sharing power with participants on an equal basis, in order to ensure a fair and just interaction within the learning event. Instances of abuse of power are common in training. They should be carefully monitored, prevented when possible, and dealt with immediately if they occur. Experience of previous Sphere ToTs has shown that establishing peer accountability mechanisms within the training team is a positive preventive tool. Humanitarian training must be liberating.

Develop your own code of conduct. Other humanitarian and training agencies have already explored this option and may be willing to share their outputs. These might assist trainers developing their own code of conduct.

Aid workers' competencies and responsibilities. All Sphere-related training ultimately contributes to the achievement of Common Standard 7 (p.40): 'Aid workers possess the appropriate qualifications, attitudes and experience to plan and effectively implement appropriate programmes.'

4.3 Constructive feedback

Summary

- The giving and receiving of constructive feedback is an essential process in the development of trainers and in improving training skills.
- Constructive feedback is an essential learning tool for the Sphere ToT.
- It is important that all feedback is authentic and relates to performance rather than personality.
- It is essential that the power dynamic is not abused in the constructive feedback relationship.

What is constructive feedback?

Constructive feedback is the process of giving and receiving comments, based on observation, about a participant's performance. It should occur as soon as possible after the event and, more importantly, it should be solicited. It implies an agreement between the giver and the receiver and an understanding that the receiver has control over the feedback and will make decisions about future performance based on it. Constructive feedback is essential to learning, both because it is immediate and, when done in a group, represents a range of views. Constructive feedback has been one of the key learning tools used during the Sphere ToT, where it is given and received after direct observation and video observation, by both participants and the training team. To this end, the Sphere ToT has sought to develop and improve the skills of participants in this area, and to emphasise the continued use of the skill as a part of their professional and personal life. Constructive feedback also contributes to personalisation and disclosure, an essential ingredient of a healthy learning environment.

The importance of constructive feedback as a learning tool

'Oh would some Power the giftie give us
To see ourselves as others see us.
It would from many a blunder free us,
And foolish notion.'

Robert Burns – 'To a Louse'

This contains the crux of what constructive feedback can provide for the learner – an expression from others of how the individual appears to them, which leads to heightened self-awareness. The learner can take the views of others and decide what to do as a result of the feedback, thus entering a loop of continued improvement.

In 1984 Joseph Luft and Harry Ingham outlined a theory of how we perceive ourselves, using the Johari window as an illustration (see below). Constructive feedback aims to reveal that part of our behaviour that is unknown to ourselves, through the honest expression of other people's perceptions. In this sense, constructive feedback can lead us to understand how we seem to act from a fresh perspective, and can lead to a deeper understanding of how to improve specific skills.

	Known to self	**Not known to self**
Known to others	Open	Blind
Not known to others	Hidden	Unknown

When a safe environment is established, feedback will occur between participants informally, outside the classroom and beyond the control of the facilitator. This is effective in building a self-sustaining process of feedback and increasing personal awareness in a group that can continue after the ToT has finished. This is another reason why a ‘safe space’ is essential for all the different ways of learning to be employed, by participants and trainer alike.

Giving and receiving feedback: some golden rules

- First, the learning environment needs to be relaxed, friendly and, above all, safe. This will break down inhibitions and enable the group to value one another more.

- The second golden rule applies to managing the power balance between the giver and receiver of feedback. Give control to the receiver, by asking them to be specific about the feedback they would like to receive. Ask them to specify areas or issues on which they would like clarification and ensure that the giver does not go beyond this framework.

- Maintain an environment that is conducive to effective communication. Think of it as a conversation. The giver of the feedback should maintain eye contact, constantly engage the receiver, ask them what they think, and consider how the receiver is reacting to what he or she is hearing.

Teaching feedback

The most important concept to impart when teaching constructive feedback skills is the notion of the power balance. It is vital that trainers are aware that a balance needs to be achieved in the constructive feedback relationship, whereby the receiver of the feedback feels there is equality and that he or she should participate in the process as much as the giver of the feedback.

It can often help to ask participants to reflect on times when they have received feedback in a positive or a negative way, and consider the factors that made the experience so[15]. Often, negative experiences relate to times when the receiver did not feel as though they had any control over the situation and were not an equal party in the relationship. Therefore, when

[15] See Appendix 4: Sample session: Constructive feedback

teaching constructive feedback skills, it is vital to stress ways in which receivers can be empowered.

On a Sphere ToT, prospective trainers have the opportunity to experience both giving and receiving feedback. This is a vital element of the self-awareness required by trainers who, in their role of teaching others, need to give feedback and appreciate how the receiver might feel. In any relationship of this type, there is also an element of power that can always be abused.

Techniques for giving feedback

The following are some of the skills that need to be employed when giving feedback.

'Own' the language. You are not necessarily right. Feedback should reflect the attitude that what you are saying is only an *opinion*, and not necessarily *correct*. If language such as 'I think that…' or 'It seemed to me that…' is used, then it reinforces this attitude, and makes it easier for the receiver to listen.

Be specific. It is not enough just to say 'I thought it was good' or 'I thought it was bad'. The receiver needs to appreciate specifically what he or she is doing right or wrong.

Don't overload. Most people are able to genuinely assimilate no more than two pieces of negative feedback at a time, so choose issues that you consider to be the most important and don't mention the rest. There will normally be another opportunity later to deal with additional points.

'Sandwich' the negative between positives. Begin with a positive point about the performance, then a negative and finally end with a positive. For example, 'I particularly liked the way you introduced the session…However, I felt because your instructions were quite complex it would have been better to write them on a flipchart as well as give them to the group… I found that you used your voice well when you were trying to get the group's attention when the exercise finished.'

Avoid platitudes. Positive feedback is useful both because it builds confidence and because it is a genuine learning point, or a reaffirmation of what someone does well. The fact that positive feedback is about learning, in the same way as negative feedback, is a point that should be stressed. Giving positive feedback should follow the same criteria as giving negative feedback: it should be specific, relate to behaviour, be prioritised, and be 'owned'. It is important that trainers appreciate that positive feedback is not the same thing as delivering platitudes. The platitude will undo any good work intended, by diminishing the trust of the receiver in the value of the feedback being given. Positive feedback that has been carefully considered in this way will lead to a stronger relationship between the giver and receiver and lay the foundations for a continuous feedback loop, controlled by the receiver.

Encourage self-assessment. It can be very helpful if you can encourage an individual to identify a pattern of behaviour or a problem for themselves by using gentle, probing questions, rather than by telling them outright what you think. This can cut down your hard work and also means that the individual is more likely to commit to change, as they feel they have ownership of the problem.

Techniques for receiving feedback

Be specific. This relates to framing what you would like feedback on. When asked, many people will say they want feedback on everything. However, it is important for the learning process that the receiver identifies areas they believe could be improved and asks the observer to look out for those areas in particular. For example, 'I would like feedback on the appropriateness of the handouts I used', or 'Could you tell me if I appear confident in front of the group?'

Listen. It can be tempting to leap in and explain why you did something, in an attempt to justify it. Instead, listen to the comments, clarify any points you need to, and then decide whether you feel the feedback is valid or not.

Verify – check it out. If you are unsure whether the feedback is valid, or even if you just want a second opinion, check out the feedback with someone whose opinion you value. Different people often have different views of the same thing.

Decide what you will do as a result of the feedback. If you decide that the comments are valid, decide on the consequences of using or ignoring them, and finally decide what you will do as a result of this. Ensure that you get additional feedback when you put into practice what you are learning.

Recognise a put-down. There will be occasions when someone gives you feedback designed to make you feel bad. Recognise the motive and don't let it destroy your confidence. It is not valid.

5. Beyond the ToT workshop

5.1 Coaching

Summary

- This section explains why previous ToT courses have included topics that provide alternatives to formal workshop training, such as coaching.
- It lists the learning objectives and key messages of this session
- It also includes some of the lessons learned from the piloting and coaching processes in Central America, and illustrates the session with a concrete 'how to' example.

Misconceptions about the ToT

Participants in a Sphere ToT workshop often tend to think they should 'replicate' the ToT workshop training they are receiving. Two messages have proved useful in dispelling this myth:

a) Participants are not expected to replicate the ToT. What they are expected to replicate are the 'blue' blocks of the agenda – those of a regular training workshop.

b) Workshops are just one of many ways of learning about Sphere.

The expectation is that the ToT graduate will facilitate learning about how to apply the content of the Sphere handbook. Obviously, the emphasis is on training workshops, yet one-to-one training is probably the most frequent type of opportunity that the ToT graduate will experience. The inclusion of coaching in the course is an attempt to remind participants about alternatives that exist and to equip them with a viable and simple technique that complements workshops. An additional reason for including this topic is that ToT graduates, once they begin to run their own workshops, will be in a position to provide follow-up support and coaching.

These are the learning objectives used in previous ToTs. At the end of this session, participants will be able to:

- define what is meant by the term 'coaching', emphasising its usefulness as a learning tool
- use one coaching method (for example, the GROW model, explained below)
- confidently explain how coaching can be used to teach people about the Sphere handbook.

Main messages included in the session

- There are a range of methods that can be used to facilitate learning about how to use Sphere.
- Coaching is a method that is effective in one-on-one situations.

- Effective coaching requires some sort of agreement between the parties about what is to be achieved through the process.
- Coaching can also be done more informally, for example with colleagues who want to become more proficient in using the Sphere handbook, and who want to be able to learn from what happens when the handbook is used.

The coaching model used – to GROW

- T is for TOPIC: identify the topic of the coaching session, and establish an informal ‘contract’ between the coach and coachee.
- G is for GOAL: the coach uses questioning to help define the goal that the coachee is struggling with.
- R is for REALITY: identification of the reality and issues faced.
- O is for OPTIONS: creative brainstorming and discussion of available options .
- W is for WRAP-UP: ranking and prioritisation of options and next steps.

Example of how the coaching sessions are run

By the last day of the workshop, people tend to be tired and some of them are already disengaging from the group. This session presents an excellent opportunity to re-engage them and to go through some experiential learning. After presenting the coaching GROW framework, ask participants to choose someone they have not interacted with much during the week. Then ask them to take a 30-minute walk together and practice the coaching method you have just shared with them. Ask participants to focus their discussion on the following question: ‘How are you going to institutionalise Sphere once you go back to your day-to-day work?’ Participants take turns to coach each other and have an opportunity to work outside of the training venue. This method has been tried in several contexts and has worked very well. One of its strengths is that it allows participants to connect with their realities ‘back home’.

Lessons learned on coaching and Sphere

In order to support the three Sphere country piloting processes taking place in Central America, a ‘coach’ was identified and contracted for 40 days over a period of six months (March to November 2003). After six months of coaching, a ‘lessons learned’ exercise took place. Here are some of the lessons learned as they relate to coaching on Sphere.

- Face-to-face and on-the-job guidance provided by the coach worked well, in fact much better than long-distance coaching.
- However, peer pressure and peer education within the Sphere working groups were more influential in achieving results. Therefore, in future the coach could concentrate on creating a conducive environment for peer education and peer accountability.
- The format of ‘coach’ proved to be the right approach, being perceived as less threatening than ‘adviser’ or ‘consultant’. This resulted in more productive interactions, allowing each agency and individual to establish terms of engagement suitable to their own reality and needs.
- It is important to distinguish between the various roles the coach will be expected to play during this type of exercise. Invariably there will be tensions between the advisory,

coaching, training and monitoring roles expected from the coach. These roles can exist in harmony with one another, if awareness and transparency are exercised at all times.

- A coach is sometimes expected to write up case studies of the people or organisations that he or she is working with. It is very difficult to be a coach and to write a case study of the 'coachee' at the same time. The lesson is: coach people to write their own case study.

Coaching versus mentoring

Be aware that in some cultures these two words are synonyms. This will present a challenge for you as a facilitator. In some cultures it is not acceptable to answer a question with another question, as to do so will mean to 'lose face' and to lose credibility. People living in highly stratified societies are taught to identify clearly who is 'superior' and who is 'inferior', and an almost immediate power relation is established between the 'coach' and the 'coachee'. Be aware of this dynamic and of your own biases in this regard. Needless to say, promoting a model of coaching helps people to challenge their own understanding of the relationship between knowledge and power.

References and resources

http://www.coachingnetwork.org.uk/ResourceCentre/WhatAreCoachingAndMentoring.htm This site defines what a coach is and what a mentor is, describes the differences and similarities between the two, and lists the characteristics of the most common types of coaching.

Landsberg, Max (2003), *The Tao of Coaching: Boost Your Effectiveness at Work by Inspiring and Developing Those Around You*, Knowledge Exchange.

5.2 The importance of the organisational context

Summary

- The impact of training depends to a great extent on the organisational environment in which the participant operates.
- Sphere ToT courses devote a percentage of their agenda to factors that limit the institutionalisation of the Sphere Minimum Standards and to tips and techniques that might overcome those factors.
- The institutionalisation of Sphere is, obviously, about organisational learning, but it is actually about more than learning – it is also about how we recognise that the organisation has learned
- Alternatives to workshops are provided to more fully equip ToT participants to facilitate this learning.

Why is the organisational context important?

The original purpose of Sphere training was to contribute to the institutionalisation of the Minimum Standards and Humanitarian Charter within the humanitarian community. It was natural, therefore, to consider the organisational environment, and in particular whether it facilitated hindered institutionalisation. For example, relevant aspects of the environment include the organisation's attitudes to change, its tolerance to risk, its openness of culture and its ability to learn. The institutionalisation of the Minimum Standards requires, by definition, institutional change. Consequently, the Sphere training programme began to think about organisational learning.

A second reason for addressing this subject was because the effectiveness of training depends on the organisation. Participants may learn something in a workshop, and the workshop may even exceed their expectations. Yet as soon as the participant returns to their regular job, with its daily pressures and competing priorities, their behaviour might not change. The effective workshop facilitator is aware of these issues, and consciously designs training events that create opportunities for learning that are relevant and meaningful. The facilitator is acutely aware of these challenges and attempts to equip workshop participants to meet them.

Awareness of how organisations behave

Some awareness about organisational behaviour has been developed on every ToT course. At the least, every participant has understood that the organisational context would be challenging. Awareness of organisations' barriers to learning has usually been achieved through story-telling and discussions between participants about what was expected of them by the Sphere Project and their organisation. Often participants have been expected to become 'champions' of Sphere within their organisation and to promote its institutionalisation. While many have accepted this expectation as natural, most have had few illusions about their ability to effect widespread change.

Typically, discussions on the barriers to Sphere institutionalisation have revolved around the following issues:

- Learning requires change, and change is threatening to power structures within organisations.
- The humanitarian sector's aversion to publicity that might harm fund-raising tends to prevent mistakes from being embraced as learning opportunities.
- Competing priorities and a lack of clarity about what priority should be given to Sphere institutionalisation are identified as major constraints.

Ideas about influencing organisational behaviour

Once these issues have been identified, individual coaching is used as a method to facilitate advice and sharing between participants. These exchanges typically identify that other organisations are facing similar issues, and generate a number of suggestions.

- The process begins with a thorough analysis of how the organisation behaves, in order to design learning events that will be appropriate and effective.
- The elements of organisational culture that promote learning are identified.
- An opportunistic approach to designing learning events is most effective.
- Ideally, one should embed workshops into the existing organisation's learning processes, rather than create something that will compete for scarce resources and staff attention.
- Any training workshop must be followed up to remind participants of what was covered and agreed, and to give the trainer an opportunity to provide coaching to the participant.

Organisational learning is ultimately about culture

Safety within organisations is crucial for organisational learning to occur. Safety means that mistakes can be really embraced as learning opportunities. For learning to occur, staff must be able to openly discuss challenges to the status quo in their organisation. The organisation needs to encourage this by providing space for reflection on performance.

Methods and techniques for facilitating organisational learning

The ToT course emphasises that ultimately the goal is about learning how to apply the Sphere handbook, not about training. If the ToT graduate thoroughly analyses their organisational context, it might be that a workshop is not the most appropriate learning method. As a result, several alternative learning methods have been presented in the course.

Case studies

- Write yourself, or encourage others to write, short case studies on the experience of using the Sphere handbook.
- The case studies should describe events in the form of a story, reflecting on insights into the dilemmas or problems faced by the actors in the story, and key learning points.
- Keep the case studies brief, allow learning points to stand out clearly, and don't present too many issues. Avoid over-generalisation and focus on the relevant detail.

After-action review

At a suitable milestone in an emergency operation, convene a short meeting with operational staff and facilitate a discussion based around the following questions:

- What was supposed to happen? What actually happened? How does this compare with the relevant information in the Sphere handbook? What were the positive and negative factors? What have we learned?

Field school

- Identify a suitable project and discuss the idea with beneficiaries and authorities.
- Convene a meeting of up to 25 project staff members and beneficiaries and brief everyone on the Sphere handbook and the project to be studied.
- Decide which Minimum Standards are relevant to the project. Divide the group into teams, each responsible for reviewing progress against one Minimum Standard. Each team should decide which key indicators they will collect data against.
- Using focus groups, key informant interviews or another suitable method, teams consult with project beneficiaries to determine the level of compliance with their Minimum Standard.
- Reconvene all teams to present findings and debate overall project compliance.

References and resources

ALNAP (2003), *Review of Humanitarian Action 2003: Field-Level Learning*, Overseas Development Institute.

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Sáenz, Juan, 'Sphere On The Job Training', *Health Exchange* magazine, August 2000.

Senge, Peter (1999), *The Fifth Discipline*, Random House: London.

Shaw, P. (2003), *Changing Conversations in Organisations: A Complexity Approach to Change*, Routledge: London and New York.

5.3 Suggested competencies

Summary

- This section contains a few reflections on competencies of people who might facilitate learning about Sphere. They might be useful in setting targets for the ToT design team.

The question of competencies

Questions often arise about the qualifications of the people who run Sphere training workshops. Perhaps these questions emerge because the Sphere handbook addresses aid worker competencies in Common Standard 7, and the same analysis is applied to workshop facilitators. Alternatively, perhaps these questions emerge during conversations that struggle to attach meaning to the certificate of participation in the Sphere ToT. What does it mean to be a graduate of the Sphere ToT? Are there Minimum Standards associated with 'Sphere trainers'?

The Sphere Project has been unable to satisfactorily answer these questions, because there has been no consensus among the Management Committee to engage in evaluative activities. In other words, the Sphere Project has had a mandate to produce the handbook and run training courses, but not to evaluate agency compliance with the handbook nor individual performance in facilitating workshops. Moreover, a system to evaluate competency would require significant resources in defining the standards of performance, obtaining consensus on those standards, evaluating competencies and monitoring compliance. Even if the political will were to exist, the financial resources have not.

However, the facilitators of Sphere ToT courses have all had tacit knowledge and opinions about the competencies they were striving to attain in their training courses. The following list is suggested as a starting-point for conversations about the competencies of a trainer who is delivering a Sphere training workshop.

Responsibility to the organisation/client

- The trainer has a responsibility to the organisation that commissions the training and strives to meet its needs.
- The trainer therefore helps to focus the objectives of those who commission the training workshop.
- The trainer helps to form achievable learning objectives.
- Once participants are identified, the trainer assesses learning needs.

Achieving the learning objectives

The trainer:

- selects an appropriate learning event
- identifies key content
- arranges learning in discrete blocks

- adapts training materials to suit specific audiences
- designs methods that will provide the appropriate learning
- reviews whether learning is occurring
- evaluates the learning event.

Creating and maintaining an effective learning environment

The trainer:

- welcomes the group appropriately
- embraces difference and creates an environment of safety
- uses core training methods effectively
- adapts to the needs of the group
- shares experiences, learning and views effectively and appropriately.

Responsibility to the practice of learning

The trainer:

- shares innovation with peers
- is committed to the highest possible standards of performance.

Contributing to humanitarian principles

The trainer:

- reflects on humanitarian and learning principles and ethics
- acts consciously to acknowledge organisational mandates or biases
- conducts him- or herself in compliance with the principles of the Humanitarian Charter and the Code of Conduct.

Maintaining self

The trainer:

- maintains personal integrity
- commits to continuous learning
- maintains health, energy and work-life balance.

References

The International Association of Facilitators has a system of certification that includes defined competencies. www.iaf-world.org

Appendices

Appendix 1: Learning needs assessment questionnaire

Questions about the participant's job and function

What are the main organisational activities?
How familiar are you with Sphere? Rate between 1 and 5, with 5 being very familiar.
Do you use the Sphere Handbook in your work?
If yes, how is Sphere applied?
Describe the main challenges in applying Sphere.
Have you had Sphere training? If so, please describe when and what.
Would you like further support with applying Sphere in your role? Please describe.

Additional questions for management

How are Sphere indicators used in project implementation?
What do you consider to be the key challenges in doing this?
What do you consider to be the key skills gaps among staff?
What internal training and ongoing support are staff offered in relation to Sphere?
What external training and ongoing support are staff offered in relation to Sphere?
Is there a budget line for Sphere training?
Is there a policy on staff release for learning activities?

Sample questions to measure knowledge about the Sphere handbook

List the three principles in the Humanitarian Charter.
Name the sources of international law from which each principle is drawn.
Describe the link between the Code of Conduct and the Humanitarian Charter.
What is the link between the Humanitarian Charter and the Minimum Standards?
What is the difference between the standards and the indicators?
What is a guidance note?
List some of the cross-cutting themes in the Sphere handbook.
What are the technical sectors represented in the Sphere handbook?
List all the common standards.
How can Sphere contribute to your organisation's accountability to the people being served by your projects?
How might your organisation use Sphere as an advocacy tool?
What additional uses might the Sphere handbook have in your organisation's relief work?

Appendix 2: Sample pre-course assignment

Instructions

1. Obtain a copy of the 2004 edition of the Sphere handbook.
2. Complete all three questions.
3. Bring your work to the course.

Question 1

Using the Sphere handbook, please complete each of the following eight parts. The index is a good place to start.

(This is designed to familiarise you with the Sphere handbook, which will be used for many of the course activities.)

1. List six sources of information for an initial assessment of water and sanitation needs in a disaster.

2. List five indicators that could be used when monitoring food security programmes.

3. Find five examples from the chapter on shelter and non-food items that explain how to protect the rights of people affected by disaster.

4. What steps should be taken when an outbreak of a communicable disease occurs?

5. What is MISP and when is it used?

6. Find two guidance notes that explain how to apply participation and gender considerations to relief operations.

7. You are a recruiter for a humanitarian agency, and must hire new staff. List five areas of experience that would be useful qualifications for candidates.

8. A major population displacement has been caused by a war. You work for a national government ministry, and are the coordinator of the humanitarian response operation that has built a temporary camp for IDPs. This has involved various government departments, local NGOs, United Nations operational agencies, international NGOs and a well-organised and effective system of beneficiary leadership. Because of a very high CMR when the camp was first opened, you have been using ‘health of the population’ as the main goal for all of the agencies operational in your area of responsibility. List eight indicators that will show that your coordinated humanitarian response operation is effective, and that until such time as those indicators have been met, the camp should be treated as an emergency situation.

Question 2

(This is preparation for the 10-minute session that you will deliver in front of a small group of colleagues during the course.)

Prepare a 10-minute session **that you will deliver** during the ToT course (on day two). PowerPoint will NOT be available. Choose ONE of the following options:

- A 10-minute presentation about an aspect of the Sphere handbook.
- A 10-minute presentation on how your organisation has applied the Sphere handbook, drawing out the lessons learned.
- A 10-minute interactive training exercise that helps people to learn about a specific issue in the Sphere handbook.

Question 3

(This exercise is designed to help you with designing the 70-minute session you will deliver during the ToT course.)

- Design a one-day workshop on how to apply the Sphere handbook, with reference to at least one technical sector.

- Assume your target audience to be humanitarian field practitioners with little or no prior knowledge of Sphere.

- Outline the sequence of the session, the key content for the session and appropriate training activities. Your document should be no longer than two pages in total.

Appendix 3: Introductions game

Participant introductory passport

Find people in the group who can answer 'yes' to one of the following statements. Once you have found the person, get them to sign their name in the corresponding box.

I have been evacuated from a work posting for security reasons. Signature:	I have hosted an embarrassing visit from my head office. Signature:
I have been to a Sphere training session before. Signature:	I have worked in four countries or more. Signature:
I have been held at gunpoint. Signature:	I can speak three or more languages. Signature:
I have been on a plane that crash-landed. Signature:	I have travelled by hitchhiking. Signature:
I have shaken the hand of a head of state. Signature:	I have a nickname (write nickname here). Signature:

When you have filled in your passport, choose someone in the group whom you don't know. As a pair, complete the following questions about each other. You will introduce your partner to the group afterwards.

Name:

Organisation:

Background:

One interesting thing about this person:

Appendix 4: Sample session: Constructive feedback

Learning objectives

- Structure feedback to ensure it is constructive.
- Recognise the value of receiving constructive feedback.
- Appreciate how the receiver can control the way in which feedback is given.

Main messages

- Constructive feedback is an excellent learning tool as it allows the learner to hear about different perceptions.
- The receiver should have responsibility in the process, by describing the points on which they want feedback and exploring comments they do not understand.

Preparation

- Timing: 45 minutes
- Handout: 'Giving and Receiving Constructive Feedback'
- Photocopy enough handouts for each participant.

Activity 1: Introduction and brainstorm (20 minutes)

- Introduce the objectives for the session.

- Ask participants to think of a time that they received a negative piece of feedback and a positive piece. They should write these down. Allow two minutes. Then participants discuss with a partner what factors made the feedback useful and what made it not useful. Take selected comments in plenary. Explain that past experience will influence how one receives and uses feedback.

- Brainstorm: how can we structure feedback to ensure it is constructive? Elicit some key points from the group and record these on the flipchart. Supplement the group's contributions with points from the handout 'Giving and Receiving Constructive Feedback'.

Activity 2: Giving feedback constructively (20 minutes)

- Ask participants to split into pairs. Explain that they are going to do a short exercise on constructive feedback. Ask pairs to find somewhere private and imagine they are running a session.

- One person in each pair should simulate running a training session for 3-4 minutes, and then receive constructive feedback from their partner for 3-4 minutes. Then rotate. The giver should mention only one thing that they believe should be changed in their partner's performance. (Note: remind participants that this should be fun.)

- When both partners have given feedback, ask in plenary:
  - How did it feel giving a 'negative' piece of feedback?

  - How did it feel receiving the feedback?

  - Why is it important not to shirk giving constructive feedback?

Activity 3: Close (5 minutes)

- Remind participants of the value of giving constructive feedback for the person receiving it.

- Remind participants of some key points concerning how to receive feedback.

- Explain that there will be a chance to practise some of these skills in the next session.

Appendix 5: Training feedback form

Use of space and room layout	
Equipment prepared	
Participants welcomed	
Session objectives established	
Assessment of current experience	
Content of session	
Stress key points/cover key information	
Accuracy and sequence of information	
Selection and effective use of training aids	
Create and maintain interest in topic	
Provide time for questions/clarification	
Check learning	
Style and rapport of trainer	
Eye contact and body language	
Management of group	
Pace of the session	
Group participation encouraged	
Manner and pace of the trainer	
Feedback and encouragement	
Creativity and interest	
Involvement of the participants	
Effective use of voice	
Summary of session	
Reinforcement of key points	
Check on learning objectives achieved	
Additional comments	

Appendix 6: Resources for participant-led sessions

Mini-session task sheet

Tomorrow, each of you will deliver a five-minute overview presentation or interactive exercise in a small group. This will be filmed, and will serve as an introduction to the sessions on 'What is a Sphere trainer?'. Each presentation will be followed by a feedback session that will be led by another member of the small group.

Instructions for preparation

- Prepare a 10-minute presentation or interactive exercise on the Sphere Project.
- Make assumptions about your audience, including pre-existing levels of knowledge about the Sphere Project.
- Write down one objective for your session.
- Your session will be done in small groups of eight people.
- Your resources will be a flipchart and pens and the Sphere handbook.

Notes on how the exercise will be run

- The plenary will divide into three groups of eight people, and each group will be led by one of the course facilitators.
- Each person will run a 10-minute session, followed by approximately 10 minutes of feedback from the group.
- Each person in the small group will get an opportunity to film someone else, as well as lead the feedback for someone else.

Maxi-session task sheet

Introduction

One quarter of this course will consist of sessions drawn from three of the Sphere Project training modules. Consisting of eight blocks of 90 minutes each, these 'maxi-sessions' will be delivered by teams of three.
The maxi-sessions are not only opportunities to practise training; they are also an opportunity to learn about the Sphere handbook, by teaching the content.

Each team is responsible for ensuring that the learning objectives for their session are met. The teams will be able to train for 70 minutes and therefore will need to adapt the training materials accordingly. Following the 70-minute session, there will be 20 minutes for feedback from the group. The maxi-sessions will be filmed, and you will be able to retain the video for viewing.

Objectives of the maxi-sessions

- To ensure the learning objectives of your session are met.
- To practise training skills and receive feedback.
- To practise adapting training materials appropriate to a set timeframe and audience.

Instructions for preparation

- Review the sessions below and choose one you are interested in.
- Find two other people with whom you would like to deliver the session.
- Sign up on the list at the back of the training room.
- Discuss with your team what your learning objectives and main messages will be, and how you will adapt the session.
- When ready, discuss your idea with one of the course facilitators.
- Collaborate with the teams presenting prior to your session and after your session, to ensure that messages are consistent and methodologies appropriate.
- You are responsible for organising the training room to suit your needs. You will have enough time to do so in the break prior to your presentation.

Options

Block 18	M1 S1 – Introduction to the Sphere Handbook	**Block 22**	Water Supply, Sanitation and Hygiene Promotion
Block 19	M2 S1 or 2 – Humanitarian Charter	**Block 23**	Food Security, Nutrition and Food Aid
Block 20	M2 S3 or 4 – Humanitarian Charter	**Block 25**	Shelter, Settlement and Non-Food Items
Block 21	The Project Cycle	**Block 27**	Health Services

N.B. If you require it, please ask for help or support on any aspect of the maxi-sessions.

Appendix 7: Sample session: What is a Sphere trainer?

Learning objectives

- Demonstrate how to use the training package.
- Discuss the role of graduates of this ToT course upon completion.

Main messages

1. Sphere is a process in which anyone can participate.
2. The group 'owns' the Sphere process as much as anyone else.
3. The Sphere handbook is a tool.
4. Sphere training helps avoid misuse of the tool. It also brings humanitarians together and thus promotes exchanges of practice and enables ownership in the Sphere process.
5. The goal of Sphere training should be to help people use the handbook.
6. There is no system of accreditation or management of Sphere trainers, but there is an expectation that graduates of the ToT course will **apply what they learn on the course**. This might include raising awareness about the Sphere Project, training individuals on how to use the handbook, or facilitating learning within agencies on how to use the handbook.
7. The Sphere training modules are structured and organised to make them easy to use.
8. The new training package has a number of tools that are extremely useful.
9. All modules except Module 1 require a good degree of training and facilitation experience.

Preparation

- This is a 90-minute session.
- There is a facilitated plenary discussion.
- Materials: laptop, data projector, screen, software, flipchart and pens.
- Handout: 'Impact of ToT Courses' (from website).
- Handout: one copy of the Learning Guide and training pack for each participant.
- Ensure that all materials are well organised prior to the session.
- The primary outcome of this session should be that participants feel comfortable with the structure and content of the training materials, and know the learning purpose of each element of the training pack and how these elements relate to each other. Don't be afraid to spend the entire session helping the group to achieve this. A secondary outcome of this session should be a sense of ownership by participants in the Sphere process.

Activity 1: Learning objectives (10 minutes)

- Show .ppt 2 and state the learning objectives.
- Remind the group that Sphere is an open and transparent process in which anyone can participate. The Project Secretariat acts simply as a facilitator to that process. Consequently, the group is also an equal member of the process.
- Reinforce that Sphere is a tool to be creatively used

Activity 2: Presentation: current Sphere Project activities (15 minutes)

- Introduce by explaining the causal hypothesis of the Sphere Project. Draw on a flipchart, or use participants in the room to illustrate the following:
  – improve the lives of those affected by disasters
  – improve the quality and accountability by NGOs and other actors in disaster response
  – enough people use the Sphere handbook.
- Explain that the Sphere Project Secretariat acts as a facilitator.
- Explain in your own words the various tracks of activity that the Sphere Project implements. Draw or write on a flipchart key words or symbols, as needed:

1. inter-agency Management Committee and multiple donors
2. awareness raising and dissemination via the electronic newsletter and website
3. resources such as brochures, videos and training modules for agencies to use
4. inter-agency Training of Trainers courses to provide human resources for agencies
5. lessons learned from pilot projects in India, DRC, El Salvador, Honduras and Nicaragua.

Activity 3: Distribution and exploration of the training pack (45 minutes)

- Explain the contents of the training package. Draw on large flipchart pages a representation of each element in the pack e.g. for the modules: contents, executive summary, background note, visual aids, session plans, optional toolkits, annexes. Post around the walls of the room.
- Distribute Module 1, and allow some time for individuals to read through it. When about 10 minutes have elapsed, lead a short discussion to highlight the structure of the modules. Ask questions that force participants to navigate through the module, for example:
    - Can you find the background note?
    - How would you use the optional toolkit?
    - When would you use Module 1?
- Ask: ‘Are there any questions about the structure of the modules?’

Activity 4: Demonstrate the use of both CD-ROMs using the LCD projector (15 minutes)

Ask a participant to volunteer to demonstrate the CD-ROMs.

Activity 5: Concluding discussion (15 minutes)

- Summarise this session by reviewing that the Sphere Project is three things:
    - a **process** of improving quality
    - a **product** of that process – the Sphere handbook
    - a **commitment** to the principles of the Humanitarian Charter and Code of Conduct
- Remind the group of the main point that participants use the handbook when their training workshops are finished.
- Ask: ‘Are there behaviours and practices that you feel are important for Sphere trainers?’

Appendix 8: Indicative agenda

	Tues	Weds	Thurs	Fri	Sat	Sun	Mon	Tues
08h30-10h30		Block 2 Expectations + ground rules Agenda overview Video introductions	Block 6 **The Project Cycle**	Block 11 Assessing KSA levels Designing a learning event	Block 16 Setting learning objectives and defining key content	Block 18 Participant-led Session 1 Introduction to the Sphere Handbook	Block 22 Participant-led Session 5 Water Supply, Sanitation and Hygiene Promotion	Block 26 Coaching and mentoring as learning methodologies
Break								
11h00-12h30		Block 3 **Module 1** **Intro to Sphere Module 1**	Block 7 Adult learning principles	Block 12 Designing a learning event (30 mins) Trainer, facilitator and learner roles	Block 17 Open self-study, review of videos, or experiential sharing by participants	Block 19 Participant-led Session 2 The Humanitarian Charter	Block 23 Participant-led Session 6 Food Security, Nutrition and Food Aid	Block 27 Experiential sharing by participants or parking lot
Lunch								
13h30-15h00	Arrival, check into hotel	Block 4 **Module 2** **The Humanitarian Charter**	Block 8 Giving constructive feedback Mini-sessions start	Block 13 Facilitation methods and techniques	Free afternoon	Block 20 Participant-led Session 3 The Humanitarian Charter	Block 24 Participant-led Session 7 Shelter, Settlement and Non-Food Items	Block 28 Managing difficulties Building blocks for a Sphere Workshop
Break								
15h30-17h00		Block 5 **Module 2** **The Humanitarian Charter**	Block 9 Mini-sessions	Block 14 Training methods and techniques Intro to the modules	Free afternoon	Block 21 Participant-led Session 4 The Project Cycle	Block 25 Participant-led Session 8 Health Services	Block 29 Preparation of individual work plans Course evaluation and closure
Break								
18h00-19h30	To start at 18:30h Block 1 Cocktail party	**Technical indicators in practice**	Block 10 Learning from mini-sessions	Block 15 Preparation for maxi-sessions		Video coaching sessions	Video coaching sessions	Closing dinner – participants leave early the following day

Sphere training modules, **by the training team,** or by participants

Adult learning principles and methods