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Guide to Training

Setting the standard for the design, delivery, and evaluation of learning programs in emerging markets

IN PARTNERSHIP WITH



THE GOVERNMENT
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Ministry of Finance



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- Promote the value of the profession to business leaders, government and those seeking a dynamic 21st century career; and
- Set the competency and ethical standards for workplace performance and learning professionals.

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GUIDE TO TRAINING

Setting the standard for the design, delivery, and evaluation of learning programs in emerging markets



Creating Markets, Creating Opportunities

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Key terms

Below are some key terms used in this book and their definitions:

Client	The client is the primary contact in the company or organization requesting the learning or training solution.
Coach	A coach is an advisor who helps someone improve skills and performance related to a specific set of tasks by providing guidance and feedback. A coach usually develops a short-term and highly structured action/task-oriented relationship that focuses on specific development areas or issues that contribute to improving specific performance goals. A coach tends to ask questions that prompt the person to find the most appropriate answers.
Competencies	<p>Competencies refer to interrelated knowledge, skills, attitudes, and values for performing effectively in a particular area. For a performance and learning professional, there are seven key and inter-related competencies: <i>Partnering with Clients</i>, <i>Assessing Performance Needs</i>, <i>Designing Curricula</i>, <i>Designing Learning Experiences</i>, <i>Facilitating Learning</i>, <i>Supporting the Transfer of Learning</i>, and <i>Evaluating Learning</i>.</p> <p>These competencies are also referred to as project lifecycle phases. This is because they align with the tasks a professional undertakes to develop, deliver, and manage a performance improvement product or service.</p>
Curricula	Curricula can be used interchangeably with “program.” Curricula refers to the framework for a set of interrelated learning experiences and accompanying materials designed to build capacity over the medium to long term, among a variety of participants.
Fragile and conflict-affected situations (FCS)	Fragile and conflict-affected situations suffer from ongoing conflict or the legacy of past violence, and face serious economic challenges, including damaged infrastructure, small private sectors, and weak regulatory environments and institutions. Entrepreneurs in fragile and conflict-affected situations often struggle to access capital and training.
Gender-inclusive program	<p>The term “gender-inclusive” refers to programs that are open to both men and women, but are designed to overcome any barriers to women’s full participation. Implementing gender-inclusive skills building programs is a powerful way to promote gender equality and eradicate gender bias.</p> <p>Gender equality is not only a social and moral imperative, but also an economic necessity. A World Bank study found that countries across the world are losing \$160 trillion in wealth because of differences in lifetime earnings between women and men. Companies, however, are realizing that closing gaps between women’s and men’s economic participation drives the growth of businesses and economies and improves the lives of families and communities.</p>
Learning experiences	Learning experiences are self-contained lessons that are intended to help a well-defined audience achieve a particular learning objective over a brief period of time (for example, minutes, hours, or days). These may use: e-learning, m-learning, instructor-led training, videos, games, simulations, audio podcasts, social media, discussion forums, chat rooms, infographics, job aids, checklists, blog posts, readings, quizzes and flashcards.

Mentor	A mentor is an advisor with deep experience or organizational knowledge. The mentor offers professional and personal support and guidance to help individuals improve their overall performance and prepare for future roles. A mentor usually develops longer-term, less-structured relationships and generally takes a broader focus than a coach. A mentor tends to share wisdom, professional experiences, or professional contacts.
MSMEs	Micro, small, and medium enterprises range from solo entrepreneurs (male and female) through companies of about 100 employees. MSMEs are particularly important in emerging markets, where they generate much-needed income and create between 70 percent and 95 percent of new employment opportunities. The term may also encompass farmers and is sometimes interpreted more broadly to include potential entrepreneurs for example, unemployed youth and refugees. In the context of performance improvement initiatives, micro, small, and medium enterprises may also represent learners, recipients, or beneficiaries.
Performance	Performance refers to behaviors that produce measurable results and that indicate progress towards—or achievement of—an outcome.
Performance and learning professional (training professional)	In this document, a performance and learning professional is referred to as a training professional who provides performance improvement services to clients. Professionals in this field may serve in a variety of roles: administrators who oversee learning and development teams, trainers, coaches, instructional designers who design and develop learning experiences in a variety of media, project managers who oversee large training efforts, managers, relationship managers or learning consultants who assess a situation and suggest whether or not learning can address it and serve as a bridge between business leaders and the learning function within an organization, and evaluators who assess the effectiveness of learning experiences.
Performance improvement	A strategic process that produces business results by maximizing the performance/ behavior of people and organizations. This process usually includes training in requisite skills and knowledge and may also include other factors that influence performance. They include coaching and reinforcement, creating incentives, streamlining work systems and processes, giving access to information, and enhancing workplace culture.
Performance improvement solutions	At their core, performance improvement solutions help individuals to develop the skills, knowledge, and attitudes needed to accomplish certain goals. These solutions ensure participants have the resources required to perform these skills. When many individuals strengthen their individual performance, the organization that sponsored the learning or other performance solution realizes a broader goal of its own and achieving that ideal has an impact on its overall results.
Sponsor	A sponsor refers to the person paying for the work: that is, the one who can authorize or stop payment for a project. This is usually a senior executive with whom the performance and learning team has limited interaction.
Stakeholder	A more general term that refers to anyone who impacts, is impacted by, or believes themselves impacted by a project or system for developing skills of micro, small, and medium enterprises in emerging markets, for example, international organizations such as IFC and International Labour Organization, development agencies, aggregators, including corporations and banks, performance improvement professionals themselves, and recipients of professional services, such as micro, small, and medium enterprises.
Subject matter experts	Subject matter experts are those who contribute content and review drafts of materials because of their knowledge, skills, and experience related to the desired performance outcomes. These people are sometimes also called industry specialists.

FOREWORD

To compete in a rapidly changing world, developing countries must build their human capital. Investing in training and continuous learning provides people with the skills and knowledge to realize their potential. It is vital to ending extreme poverty and creating more inclusive societies. But to keep pace with the skills demanded by the modern economy, the training and learning sectors need to adapt.

Countries provide billions every year in development assistance for capacity building. Yet the impact is often underwhelming or unmeasurable. Many current training programs aren't scalable or cost-effective, and trainers often have limited access to tools and resources to meet the challenge.

That's why we developed this *Guide to Training*. It offers a roadmap for training professionals to design and implement successful learning and skills programs in emerging markets, giving them the tools to strengthen their client companies and help build the skilled workforce of the future. The guide provides detailed steps and advice for each phase of a training project for classroom-based, digital, or blended programs. It is essential reading for trainers, coaches, advisory service providers, and anyone who designs or manages learning experiences.

The information in this guide is especially critical for training programs targeting micro, small, and medium enterprises, which provide the majority of jobs and income in emerging economies. It will help unleash the untapped potential of women entrepreneurs and develop human capital where it is needed most—in areas plagued by fragility, conflict, and violence. The economic downturn caused by COVID-19 has significantly affected micro, small, and medium enterprises and is expected to exacerbate pre-existing gender gaps for women-owned and led businesses. For example, women, including women business owners, are about 20 percent less likely than men to access mobile internet at a time when it can be a determining factor for their survival. In addition, heightened connectivity issues and underdeveloped digital skills make it difficult for most women entrepreneurs to rapidly digitize their businesses in a way that would allow them to timely navigate shocks from the crisis. Therefore, capacity building and training are important now more than ever, and the *Guide to Training* couldn't have come at a more crucial time.

The *Guide to Training* captures knowledge and best practices from a range of learning institutions and specialists. Experts on gender-inclusive initiatives and IFC staff working in emerging markets and regions affected by fragility, conflict and violence, have contributed their experience and lessons learned. The *Guide to Training* also puts IFC's newly-created Principles for Learning into action for training and advisory service providers working in emerging markets. These principles reflect the four key elements of successful training and skill development programs. They should be Impactful, Inclusive, Scalable, and Sustainable.

The guide and the principles can also be used by companies and organizations as screening criteria when identifying solutions, work plans, or vendors for their projects. They will be updated to stay current on best practices and industry needs.



I am confident the framework detailed in these pages will equip training professionals to embrace the opportunities offered by emerging markets—and at the same time help drive growth, job creation, and prosperity in developing countries.

A handwritten signature in dark ink, appearing to read 'Paulo de Bolle'.

Paulo de Bolle

Global Senior Director, Financial Institutions Group, IFC

ACKNOWLEDGEMENTS

This publication incorporates best practices and learning identified from many programs and experts from IFC, the World Bank, and other institutions and organizations. Based on content originally developed by the Institute for Performance and Learning, additional desk research was conducted to gather questions and lessons on conducting performance improvement programs in emerging markets and fragile and conflict-affected situations and programs specific to women.

The report is produced in partnership with Canada, Luxembourg, and Norway.

IFC, in partnership with Luxembourg and Norway, is committed in improving the performance of large numbers of value-chain linked small and medium enterprises historically underserved through solely financed initiatives while creating local non-financial advisory services markets that will sustain and scale these services in the economies where IFC works.

IFC and Canada are partners in identifying the key constraints affecting women's economic empowerment and reducing gender inequalities through implementing business environment reforms, strengthening women-owned enterprises, and creating better employment opportunities for women.

This publication was developed as part of the Grow Learn Connect program supported by IFC's Financial Institutions Group.

The core working group of the initiative, jointly led by Graeme Harris and Neal Alan Donahue includes Khadiga Hassan Fahmy, Sokhareth Kim, Evangelia Tsiftsi, Mark L. Nielsen, Karen Feeley, Mandy Grant and Rania Fouad Nader.

Heather Kipnis, Joanna Romero, Anna Domingo Riu, Maria Tandeck, Rudaba Zehra Nassir, Alexa Roscoe, and Shabnam Hameed, as well as the Inter-American Development Bank, Thunderbird School of Global Management, Value for Women, and Double XX Economy, offered invaluable insights to the gender inequalities, impacting capacity building in emerging markets, including family and care responsibilities, mobility constraints, legal barriers, and time demands.

Shaza Zeinelabdin, Joanna Kata-Blackman, Gosia Nowakowska-Miller, Awena Lebesch, Ferdinand Ngobounan, and Priyam Saraf and Miguel Angel Jimenez Gallardo from the World Bank offered insights to the considerations that performance and learning professionals need to take into account when working in the most challenging regions. The following IFC-certified Master Trainers also offered valuable insights when working in fragile and conflict-affected situations: Adnan Al Sada (Capital Management & Consulting, Yemen), Bibiana Mbuh Taku (Diversity Management & Consulting Cameroon), Margaret Jackson (Rainbow Consult, Ghana), Carol Mwazi (Huru Consult, Kenya), Mehdi Chahed (Centre d'Etude de Formation et d'Assistance CHAHED: CEFAC, Tunisia), Rohit Agarwal (Extra Mile Learning, India), Farah Malebranche Petit-Frère (Gravis Consulting & Research, Haiti), Fatma El Maawy (Milestones Resources Solutions, Kenya), Rami Camel Toueg (Integrated Management Consultancy, Egypt), Samuel Siteo (Mwalimu Consulting Research, Mozambique), Ashraf Shenouda (AGS & Associates—Governance, Management & Training Consultants, Egypt), and Laban Mawungwe (LAP Marketing Consultants, Uganda).

The report was edited by Gina Deanne Wilkinson and Asra Quratul Ain Nomani, with cover design by Justin Martinez (Astral Studio) and interior design and composition by Rikki Campbell Ogden (pixiedesign). Henry Pulizzi and Robert Wright supported the production and dissemination of the report.

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INTRODUCTION

WHAT IS THIS GUIDE ABOUT?

Growing Your Training Business Where It Is Needed Most

Across the world, training professionals strive to expand their businesses and gain a competitive edge in this vital industry. This guide will help trainers and learning professionals achieve that goal in two important ways. First, whether working in developed or emerging markets, this guide provides a clear competency framework to strengthen the skills and expertise of trainers, coaches, and advisory service providers, designers and developers of learning experiences and materials, administrators and project managers who oversee large training efforts, relationship managers, learning consultants, and anyone seeking to transfer knowledge and skills. Second, it provides specific, practical advice on how to enter and thrive in the underserved markets of emerging countries, where the opportunities—and challenges—for high-quality training services are immense.

Sharing Decades of Expertise

IFC has been working in emerging markets for over 60 years. Part of the World Bank Group, IFC is the largest development organization focused exclusively on supporting the private sector in emerging countries, equipping us with deep insight into the complex factors that can make or break businesses in these challenging markets. That is why we partnered with training industry experts to develop this guide. By sharing our knowledge and lesson learned on how to assess, mitigate, and overcome the challenges of operating in the toughest environments, we can help training professionals, their clients, and program participants reach their true potential.

A Competency Framework for Training Professionals

Based on industry best practices, the guide examines the key competencies and tasks for professionals working on performance improvement initiatives. These are grouped into the seven phases typically found in any training project lifecycle. These include *Assessing Performance Needs*, *Designing Curricula*, *Designing Learning Experiences*, *Facilitating Learning*, *Supporting the Transfer of Learning*, and *Evaluating Learning*. Throughout the project phases, it is critical to maintain a strong relationship with clients. That's why *Partnering with Clients* is positioned at the center of the project lifecycle, touching all other phases.



FIGURE 1: The competency wheel

Navigating the Training Environment in Emerging Markets

Along with laying out a competency framework for all training contexts, this guide pays special attention to key issues of concern for trainers working in emerging countries.

Micro, small, and medium enterprises often form the economic backbone of these markets, and as such, they are key clients for trainers and learning professionals. These businesses generate income and create the majority of jobs— between 70 percent and 95 percent of new employment opportunities—in emerging economies.

In **fragile and conflict-affected situations**, micro, small, and medium enterprises play a particularly important role. Often, they are the last businesses standing, providing essential goods and services to vulnerable populations. Already more than 130 million people, or 2 percent of the world's 7.8 billion people, live in fragile and conflict-affected situations. By 2030, up to 2/3 of the world's extreme poor, could live in situations of fragility, conflict, and violence.¹ It is in here that the need for learning and skills building is perhaps most immense, and the risks and rewards are greatest for all involved, be they trainers, program participants, or clients.

Closing the gender gap in access to skills is another critical issue for trainers in emerging markets. Equipping women with skills and knowledge and enabling them to realize their tremendous potential is not only a social and moral imperative, but it is an economic necessity too. A World Bank study found that countries globally are losing \$160 trillion in wealth because of differences in lifetime earnings between women and men. Companies, however, are realizing that closing gaps between women's and men's economic participation drives growth and improves the lives of families and communities. And despite the many obstacles they face, women entrepreneurs own or run one-third of small and medium enterprises in emerging markets, and in many places they are starting businesses at a faster rate than men.

HOW CAN THIS GUIDE HELP?

Trainers and learning professionals contemplating projects in emerging markets often have similar questions. Where can I get the information I need to scope out, design, or deliver training in emerging markets? What are the practical implications of working in fragile and conflict-affected situations? How can I effectively close gender gaps when designing learning programs and facilitating training? What have other trainers learned, and how can I apply these lessons to my own projects? How can I develop my expertise in this market? This guide answers these and more questions, and it also:

- Presents a clear picture of what it means to be a competent training professional, based on industry best practice.
- Promotes effective, gender-inclusive learning that produces results for clients who operate in emerging markets and the learners affiliated with them.
- Provides a framework for the design of curricula and the design and development of specific learning experiences for gender-inclusive projects in emerging markets.
- Enhances the credibility, respect, and professional status of people working in the performance and learning field in emerging markets.
- Provides a foundation for certifying training professionals who work in emerging markets.

This guide recognizes that training is not an exact science, and competency should focus on the practical application of best practices, informed by evidence-based research. Organizations who administer performance improvement projects in emerging markets may choose to supplement these guidelines with their own operational procedures and vice versa.

¹ <https://www.worldbank.org/en/topic/fragilityconflictviolence/overview>, visited May 12, 2020.



TABLE 1: How can this guide help training professionals and their clients

BENEFITS FOR TRAINING PROFESSIONALS	BENEFITS FOR CLIENTS AND THEIR ORGANIZATIONS
<ul style="list-style-type: none"> ▸ Learn the latest developments for training professionals working in emerging markets 	<ul style="list-style-type: none"> ▸ Keep up-to-date on best practices in learning and performance improvement in emerging markets
<ul style="list-style-type: none"> ▸ Design and develop effective learning experiences and programs that address your clients' and participants' needs 	<ul style="list-style-type: none"> ▸ Evaluate and compare curricula and learning experiences and share learning resources ▸ Create and deliver consistent, well-designed curricula and learning experiences ▸ Use the guide's cross-industry standards to create synergies with like-minded organizations and optimize training programs
<ul style="list-style-type: none"> ▸ Hone your professional conduct and communicate effectively with clients, sponsors, program participants, and others 	<ul style="list-style-type: none"> ▸ Contribute to the pool of qualified performance and learning professionals in emerging markets
<ul style="list-style-type: none"> ▸ Articulate your personal and professional development goals 	<ul style="list-style-type: none"> ▸ Learn how to identify and select competent learning and performance of professionals
<ul style="list-style-type: none"> ▸ Understand your own knowledge and skills, areas of strength, and areas needing improvement 	<ul style="list-style-type: none"> ▸ Gain a competitive edge by consistently applying industry best practices

THE STRUCTURE OF THIS GUIDE

This guide is divided into seven chapters and two supplements on gender-inclusive programs and considerations when working in fragile and conflict-affected situations. Each chapter focuses on one specific competency or phase of a learning program, its supporting competencies, and project tasks. The competencies are designated with a number, and the supporting competencies are designated with a number and letter. The tasks are designated with a check box.

As a training professional, you need to be proficient in all three. Each chapter also identifies key outputs and assessment criteria, as well as additional factors to consider when executing a competency or phase of a training program in an emerging market.

FCS and gender-inclusive tasks are included for each competency. For easy reference, we have added FCS  and gender  icons wherever relevant. ←.....

It is important to read the FCS and gender supplements at the end of this guide. These provide crucial information on how to apply the FCS and gender-inclusive tasks presented in the competency framework. The tasks are divided into three categories: country, individual, and family. The family category only appears in the gender supplement to avoid duplication. While not exhaustive, these considerations can help guide effective program development and implementation. They include questions to ask clients and participants and evidence-based advice and approaches based on best practices and lessons learned by World Bank Group staff and other experts.



The competencies are designated with a number.

The supporting competencies are designated with a number and letter.

The tasks are designated with a check box.

FCS and gender-inclusive tasks are indicated by an icon. These tasks are further elaborated in the FCS and gender supplements.

ASSESSING PERFORMANCE NEEDS

COMPETENCIES AND SUPPORTING COMPETENCIES | This section contains information about the importance of mastering the competencies, tasks for each supporting competency, key outputs, and assessment criteria.

1. PREPARE TO ASSESS	30
1a. Clarify the client perspective	30
1b. Gather initial information	30
1c. Plan needs assessment	31
Key outputs and assessment criteria	31
2. IDENTIFY PERFORMANCE GAPS	32
2a. Gather data to determine current and desired performance outcomes	32
2b. Conduct job, competency, or goal analysis to determine desired performance outcomes	33
2c. Identify desired performance outcomes and business measures	33
Key outputs and assessment criteria	34
3. DETERMINE CAUSES OF PERFORMANCE GAPS	35

1. Prepare to assess

Importance

The impact of mastering these competencies is that you:

- Focus on the needs of the participants and your client, and avoid a “knee-jerk” response to requests for a learning solution.
- Plan for an efficient and effective assessment of performance needs.
- Start building a partnership with your client.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

1a. Clarify the client perspective

- Explore what the client thinks is actually happening versus what should be happening
- Identify changes the client wants to see (for example, desired performance outcomes, behavior, values, attitudes)
- Determine measurable business results from the program
- Identify stakeholders who will influence the project, along with their roles and perspectives
- Identify organizational realities and environmental factors that the client is facing
- Confer with your client on recent political and social developments in the area and their possible impacts on the program and the safety of its participants
- Determine how the client will make decisions about recommended solutions
- Address any client requests or concerns that could detract from a successful needs assessment

1b. Gather initial information

- Determine the extent to which other stakeholders share the client's perspective
- Survey existing and past programs conducted in this or similar regions
- Determine availability and quality of local advisory services
- Map the ecosystem of programs in your region that target women or focus on gender inclusion
- Determine the sophistication of the private business culture in the region
- Identify the impact of the program
- Compare stated and actual possible impact
- Assess transport
- Examine local culture
- Identify religious practices
- Determine impact of the program
- Determine how to evaluate results

FCS CONSIDERATIONS WHEN ASSESSING PERFORMANCE NEEDS

Time and resources needed to properly assess performance can vary greatly. You may need to spend a few hours clarifying what participants should be able to do after a learning experience. As a minimum, the main objectives of *Assessing Performance Needs* are:

- Have facts that support assumptions.
- Address the right problems and causes.
- Avoid rushing into a learning solution.
- Identify the best solution or blend of solutions.
- Determine how to evaluate results.

When *Assessing Performance Needs* as design and deliver gender-inclusive programs or projects:

- Identify women who represent the target audience for the curricula.
- Specifically targeted to women, it is important to clarify who will be participating in the program.
- To decide on the requirements of the program, a thorough analysis of the local culture, both women and men participants' education and knowledge levels, their overall level of confidence and leadership skills, and family decision-making and caregiving responsibilities is required. For example, if a digital solution is proposed, check women participants' degree of confidence and comfort with online learning. Women often have less access to digital solutions but need to attend online training and learning opportunities. Remember to include women on women's progression in assessing program needs and designing curricula, whether targeting women only or both genders. This can be achieved by including women in the assessments and design teams or interviewing women who represent the target audience for the curricula.

CONSIDERATIONS AND TASKS	QUESTIONS	TIPS AND APPROACHES
COUNTRY		
CULTURAL AND SOCIAL NORMS	<p>1. What external influences (cultural, societal, or religious) impact program design, content, participation, or delivery?</p> <p>2. How does local society perceive women in business? Does the local society support women's participation as employees in the formal workforce?</p> <p>3. What are the barriers to gender inclusion?</p>	<ul style="list-style-type: none"> Include women in the assessment teams and interview women who represent the target audience. Inquire about participants' day-to-day lives so you can align your program with their training preferences and goals. Determine whether local cultural norms require separate sessions for women or if women participants prefer separate, women-only programs. In some cases, a mixed-gender program may provide more learning opportunities or leadership skills for women by getting them exposed to various styles of leadership across men and women. Consult with trusted local experts on perceptions of women in the workplace or as business owners. Evaluate the role that local media plays, or could play, in the perception of women entrepreneurs and employees.

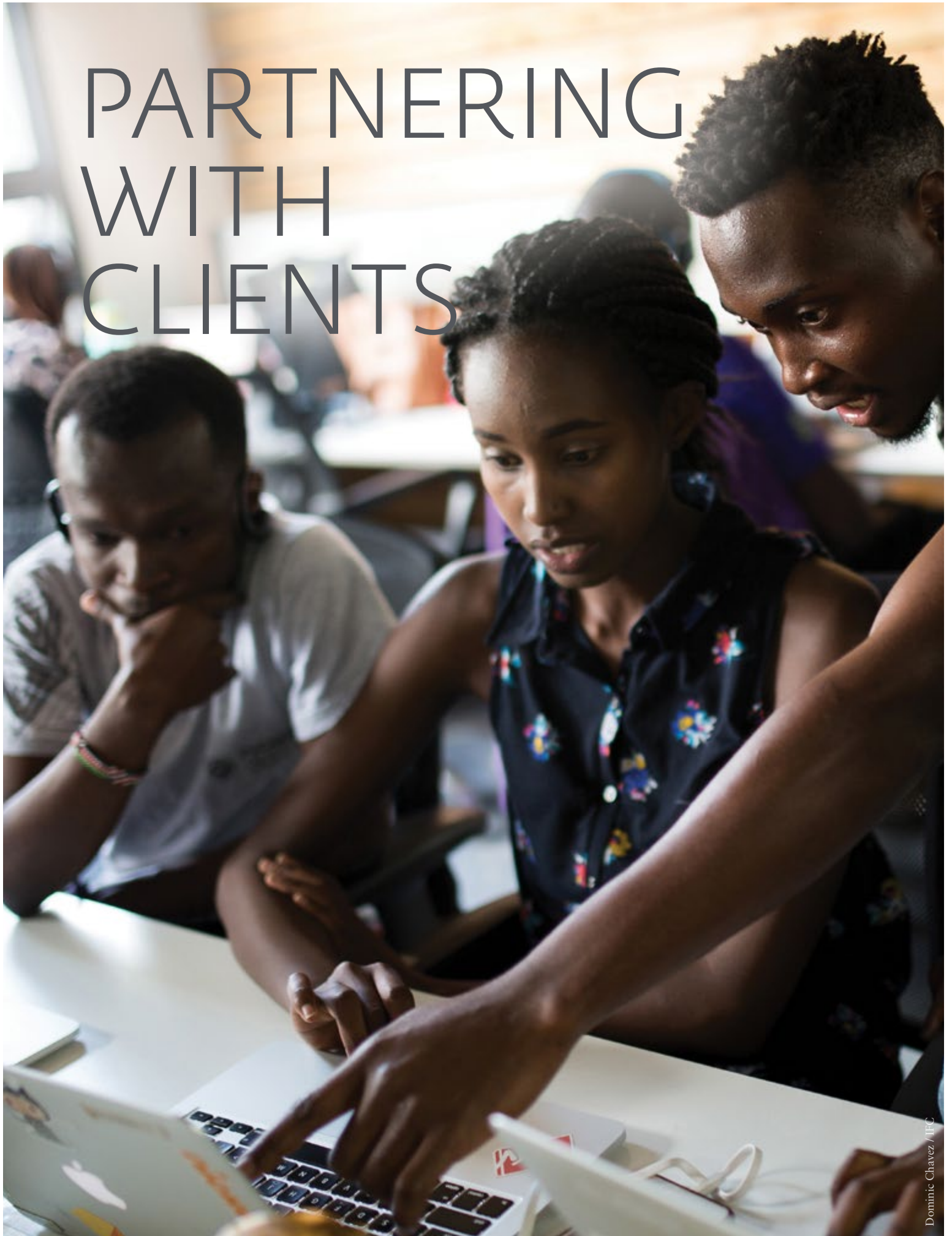
AND APPROACHES

Determine how to conduct rigorous background checks before selecting participants or providers for the program.

Training requirements for assessing the training site (for example, ID checks at security desks) have a full, up-to-date briefing on security site from the identified security officer in the target location.

Consider additional training for program providers how to operate securely in FCS.

PARTNERING WITH CLIENTS



INTRODUCTION

It is critical for all training professionals to maintain a strong relationship with the client throughout the entirety of a project. That is why *Partnering with Clients* lies at the center of the competency wheel, touching all phases of the project lifecycle.

The *Partnering with Clients* competency has five sub-competencies: Demonstrate Awareness of Client Organization, Support Clients in Making Effective Choices, Develop Agreements with Clients, Manage Changes Throughout a Project, and Interact Effectively—all of which are related to effective communication.

Whether you are an internal employee at the client's organization or an external service provider, you have people to whom you provide a service—and the competencies in this category apply.

In the interest of clarity, we define terms used in this section as follows:

- Your client is the principal individual to whom you provide your solution. Typically, a client has day-to-day approval authority. A client differs from the sponsor, who funds the project and has ultimate or final approval authority, although sometimes the same individual will play both roles. Training professionals use the terms client and sponsor whether they work internally or externally.
- Your client is just one of your stakeholders. Stakeholders also include the sponsor, the participants, and anyone with an interest or concern in the solution, such as your business or organization representatives, donors, unions, suppliers, health and safety committees, and your client's clients.

Competent *Partnering with Clients* increases the likelihood that you:

- Get the input you need to achieve or exceed expectations on an assignment.
- Expand your client's and your own thinking about effective and innovative solutions.

- Meet the needs of both the participant and the organization sponsoring the project.
- Minimize misunderstandings, surprises, or disappointments.
- Build commitment to implement solutions.
- Complete projects on time and within budget.
- Maintain client satisfaction throughout the project.

When partnering with clients in emerging markets, it is important to consider additional factors that may affect how you interact with the client, for example:

- How will you accommodate the local societal, religious, political, gender, and corporate norms of the client?
- What economic, legal, and political factors may affect the program's cost, timeline, content design, and delivery?
- What is the most effective, culturally appropriate, gender appropriate, and technologically feasible means of communicating with the client and the participants?
- How are women perceived in the organization and what are the client's expectations regarding training, mentoring, and coaching both men and women? How will you prove the business case for gender-inclusive programs?
- Who is responsible for researching, organizing, and paying for logistics, infrastructure, and technology, the safety and security of program contractors and participants, and the establishment of social networks to reinforce learning and enhance the impact of the program?
- What risks are there? What preventive measures and contingency actions need to be incorporated in the plan, such as emergency responses in fragile and conflict-affected situations?

You need to identify, discuss, and agree upon these considerations with your client, so that everyone has the same expectations from the beginning. This allows you to consider any challenges to the delivery of the project up front and factor them into the timeline and execution plan.

For additional information on *Partnering with Clients* when conducting training in fragile and conflict-affected situations and gender-inclusive training, please refer to the FCS and gender supplements at the end of this guide.

PARTNERING WITH CLIENTS

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1. Demonstrate awareness of client organization



Importance


The impact of mastering these competencies is that you:

- Gain or maintain credibility with your client and other stakeholders.
- Align learning with the vision, values, and direction of the organization.
- Contribute to realistic project plans that can be implemented efficiently.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

1a	Demonstrate awareness of the vision, values, and strategic direction of organization/work unit
<input type="checkbox"/>	Conduct initial research before meeting with clients
<input type="checkbox"/>	Describe the priorities of specific lines of business, functions, or work units
<input type="checkbox"/>	Identify challenges and opportunities in external environments that affect directly the organization/work unit <ul style="list-style-type: none">▸ Safety of participants and program providers  ▸ Economic stability, business conditions, mergers and acquisitions, and impending legislation▸ Accessibility, availability, and reliability of information and communication technology at the program location▸ Infrastructure and logistics including venues and services (for example, utilities, transport, catering and accommodation)
<input type="checkbox"/>	Assess implications of this knowledge for performance and learning
1b	Demonstrate knowledge of how work gets done in client organization / work unit
<input type="checkbox"/>	Demonstrate knowledge of organizational structure and functions
<input type="checkbox"/>	Demonstrate knowledge of key inputs and outputs
<input type="checkbox"/>	Demonstrate knowledge of key organization processes
<input type="checkbox"/>	Demonstrate knowledge of how roles communicate in the organization
<input type="checkbox"/>	Demonstrate knowledge of how decisions get made (for example, speed of decision making, who is involved, who has authority, key influencers, consensus versus hierarchy, layers of approval)
<input type="checkbox"/>	Determine how the client will qualify participants to the program

1C	Demonstrate knowledge of client organization/work unit culture
▶	Use language and common acronyms of the organization
▶	Identify whether the culture of the client is one that prioritizes relationship building and trust above completing transactions, or vice versa
▶	Demonstrate knowledge of the norms, environment, conditions, and demographics of the program participants of the organization/work unit (for example, literacy rates, gender ratio, urban or rural locations, religious requirements)
▶	Determine how women are perceived in the organization and the client's awareness of issues related to gender inclusion 

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Learning aligned with strategic direction	Organization vision, values, and strategic direction supported
	Specific links to vision, values, and strategic direction included where applicable
	Current or imminent realities in external environment taken into account
Project plans	Appropriate stakeholders involved based on knowledge of organization
	Decision-making norms in the organization reflected
Professional credibility	Demonstrate understanding of the organization/work unit
	Professional credibility acknowledged by clients and other stakeholder

2. Support clients in making effective choices








Importance










The impact of mastering these competencies is that you:

- Provide effective and efficient learning solutions.
- Avoid jumping to simplistic solutions and being swayed by current fads.
- Gain or maintain credibility with your client and other stakeholders.
- Behave in an ethical and professional manner.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

2a	Propose solutions based on foundational and evolving best practices
<input type="checkbox"/>	Information on evidence-based best practices from learning and other fields in emerging markets
<input type="checkbox"/>	Explain current and emerging research regarding best practices in learning and performance
<input type="checkbox"/>	Communicate how gender equality and gender inclusion can benefit their business 
	‣ Explain how training women will help clients/donors achieve their goals and benefit their businesses
	‣ Prepare information sessions to communicate benefits to clients
<input type="checkbox"/>	Identify the evidence that is needed to support ideas about learning and performance
<input type="checkbox"/>	Challenge your own and others' assumptions that limit learning and performance
<input type="checkbox"/>	Communicate how accommodating participants' psycho-emotional needs can benefit program results 
<input type="checkbox"/>	Leverage client, participant, and other stakeholder expertise and knowledge
<input type="checkbox"/>	Support the right decisions that are consistent with professional ethical behavior
2b	Consider a range of options
<input type="checkbox"/>	Consider long-term and short-term implications
<input type="checkbox"/>	Engage client, participants, and other stakeholders in considering options
	‣ Explore viability of digital solutions  
	‣ Explore mentoring and coaching and ways to build resilience  
	‣ Explore ways to boost and enhance female participation in the program 
<input type="checkbox"/>	Use an iterative approach to test ideas early and often
<input type="checkbox"/>	Integrate different perspectives
<input type="checkbox"/>	Synthesize and reorganize ideas
<input type="checkbox"/>	Use constraints as an opportunity for creativity (for example, alternatives to face-to-face training)
<input type="checkbox"/>	Create prototypes to test design ideas
<input type="checkbox"/>	Assess options against established criteria

	Advocate for the best solution for the client, participant, and organization
	Offer alternative solutions as appropriate, highlighting risks and mitigations
2c	Support stakeholders in promoting the solution within the organization
	Provide guidance and advice to help stakeholders prepare for key meetings on learning
	Provide data to support learning decisions within the organization
	Provide examples to support decisions about learning within the organization
	Provide key messages for communications about change and learning
	Identify the most effective culturally appropriate, gender appropriate, and technologically feasible means of communication  

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Effective and efficient learning solutions	Based on accepted best practices in performance and learning
	Participants' reality and underlying needs addressed
	Collective expertise of multiple stakeholders reflected
	Longer-term needs of organization taken into account
Acceptance of solutions within organization	Client, stakeholders, and sponsor recognize any limiting assumptions, including political instability and barriers to women's participation
	Client is supported in making a persuasive case for an effective, efficient solution, including the business case for supporting gender-inclusive programs or those specifically targeted to women
Professional credibility	Professional credibility acknowledged by clients and other stakeholders

3. Develop agreements with clients






Importance






The impact of mastering these competencies is that you:

- Calculate projects' costs accurately.
- Plan project tasks, timing, and resource requirements accurately.
- Anticipate potential problems and put preventive and contingent actions in place.
- Meet or exceed client expectations for a project.
- Complete tasks (or project) on time.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

3a	Clarify client expectations regarding a project
<input type="checkbox"/>	Ask questions to learn about the client's situation, purpose of the assignment, performance issues to address, and priorities
<input type="checkbox"/>	Determine client's commitment and capacity to support the program in an FCS setting 
<input type="checkbox"/>	Agree on the official language of the project and translation requirements
<input type="checkbox"/>	Determine key values that the client wants to convey or reinforce in the program
<input type="checkbox"/>	Ask questions to identify underlying concerns that might affect the program
<input type="checkbox"/>	Summarize and restate client expectations to ensure agreement
<input type="checkbox"/>	Determine how the client plans to decide which participants qualify to participate in the program
<input type="checkbox"/>	Determine appropriateness of monetary incentives for participants  
<input type="checkbox"/>	Determine confidentiality requirements
<input type="checkbox"/>	Confirm contract terms and conditions 
<input type="checkbox"/>	Determine the most appropriate methods for monetary transactions 
<input type="checkbox"/>	Determine client knowledge of the design and development process required to produce the work
<input type="checkbox"/>	Determine measures of success
3b	Gather information about previous similar projects
<input type="checkbox"/>	Assess client willingness and ability to share prior information with you
<input type="checkbox"/>	Investigate past experiences with the client, sponsor, and stakeholders
<input type="checkbox"/>	Investigate the process and outcomes of prior projects of similar type and scope
<input type="checkbox"/>	Investigate the reliability of information provided on prior projects
3c	Clarify roles of client, participants, other stakeholders, and performance and learning professional(s)
<input type="checkbox"/>	Identify whom to involve and the nature of their involvement
<input type="checkbox"/>	Identify available local or international resources (for example, trainers, designers, consultants, business learning specialists)

▶	Identify accountabilities for the client, participants, and other stakeholders (for example, who is responsible, accountable, supporting, consulted, informed)
▶	Identify who is responsible for researching, organizing, and paying for: <ul style="list-style-type: none"> ▶ Catering, venue and equipment requirements  ▶ Safety of participants and providers, including travel, venue and transport, and insurance and emergency services   ▶ Establishment of social networks to reinforce learning and enhance the impact of the program
▶	Clarify who makes project decisions and how (for example, consensus, unilateral, change control process)
▶	Identify your role on the project, how you interact with others, and how your role affects upstream and downstream processes
▶	Identify communication protocols within your organization as well as in the client organization (for example, hierarchical or decentralized communication between project team members) <ul style="list-style-type: none"> ▶ Discuss appropriate/available communications channels for the program  
▶	Refer to other experts as necessary to supplement your own knowledge or source other areas of expertise (for example, change management, recruiting, human resources, organization development)

3d Negotiate assumptions and deliverables, as well as level of quality, timing, and cost

▶	Define project scope based on competencies in the assessing and designing categories
▶	Determine how the client wants to prioritize trade-offs among cost, time, and quality
▶	Set protocol for scope changes
▶	Plan purpose and timing of meetings
▶	Determine how the client would like to receive communication on status of the project
▶	Determine acceptance criteria at each stage of the deliverables
▶	List assumptions that affect project scheduling, deliverables and costs

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Verbal and written agreements with clients	Client expectations reflected
	Stakeholders and roles identified
	Assumptions, deliverables, timing, and costs identified
Project plans	Plan makes best use of organization resources
	Project cost estimates are accurate
	Dates, dependencies, resources, durations, and costs identified
	Schedule is articulated
Professional credibility	Professional credibility is acknowledged by clients and other stakeholders

4. Manage changes throughout a project


Importance

The impact of mastering these competencies is that you:

- Respond effectively to unavoidable changes.
- Prioritize changes based on the impact of learning and performance.
- Complete projects on time and within budget.
- Manage your own workload and the workload of others on the project.
- Gain or maintain credibility with client and other stakeholders.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

4a	Develop realistic project plans
<input type="checkbox"/>	Define the activities required to complete the work
<input type="checkbox"/>	Determine dependencies and sequence activities
<input type="checkbox"/>	Estimate resources, durations, and costs, including indirect costs that might drive up the costs of this project (for example, stipends, meals, transportation)
<input type="checkbox"/>	Develop a schedule
<input type="checkbox"/>	Identify risks and plan preventive and contingency actions including emergency responses 
4b	Keep projects on track
<input type="checkbox"/>	Manage time and scope of work to keep projects on schedule
<input type="checkbox"/>	Keep client apprised of progress
<input type="checkbox"/>	Communicate status and issues proactively to key stakeholders
<input type="checkbox"/>	Communicate with team members and subject matter experts on work status
<input type="checkbox"/>	Refer to project plan and in-scope and out-of-scope items when making decisions
<input type="checkbox"/>	Anticipate and proactively manage risks
4c	Negotiate changes in scope
<input type="checkbox"/>	Explore trade-offs among deliverables, timing, and costs
<input type="checkbox"/>	Determine impacts on other organization projects if changes are made in this one
<input type="checkbox"/>	Inform key stakeholders of impact of change request prior to implementing
<input type="checkbox"/>	Obtain approval from the appropriate stakeholders

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Project change requests	Change requests that identify reasons for change and the impact on time, quality, cost
	Change requests are based on exploration of options with client and stakeholders
Project plans	Project cost estimates are accurate
	Dates, dependencies, resources, durations, and costs are identified
	Schedule is articulated
	Plan is updated throughout project to guide work
Professional credibility	Professional credibility is acknowledged by clients and other stakeholders

5. Interact effectively


Importance

The impact of mastering these competencies is that you:

- Get the input you need to provide the best possible solutions.
- Build commitment to implementation by involving others.
- Help the client and stakeholders learn about the field of performance and learning.
- Gain or maintain credibility with client and other stakeholders.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

5a	Seek input from client, participants, and other stakeholders
<input type="checkbox"/>	Involve client, participants, and other stakeholders to gather information and different perspectives
<input type="checkbox"/>	Engage client, participants, and other stakeholders to build commitment
<input type="checkbox"/>	Ask questions that promote breakthrough thinking and generate insights
<input type="checkbox"/>	Ask for and respond to feedback
<input type="checkbox"/>	Collaborate effectively with people across borders, languages, cultures, genders, and generations
5b	Present information and concepts clearly and succinctly
<input type="checkbox"/>	Determine client's current level of knowledge about learning and the design process
<input type="checkbox"/>	Explain the alignment between learning and the business strategy and priorities, including the business case for gender-inclusive learning programs or those specifically targeted to women 
<input type="checkbox"/>	Illustrate learning concepts, research, and technology
<input type="checkbox"/>	Establish expectations for time to full proficiency after training
<input type="checkbox"/>	Use technical terminology of the client's field, industry, or industry segment
<input type="checkbox"/>	Show respect for stakeholders' time
5c	Manage differences of opinion among stakeholders
<input type="checkbox"/>	Clarify issues
<input type="checkbox"/>	Reframe disagreements in neutral terms
<input type="checkbox"/>	Facilitate the development of solutions
<input type="checkbox"/>	Identify and show sensitivity to the needs and boundaries of others
<input type="checkbox"/>	Know when to compromise or stand firm, if there are different perspectives

5d Act as an ambassador for your group

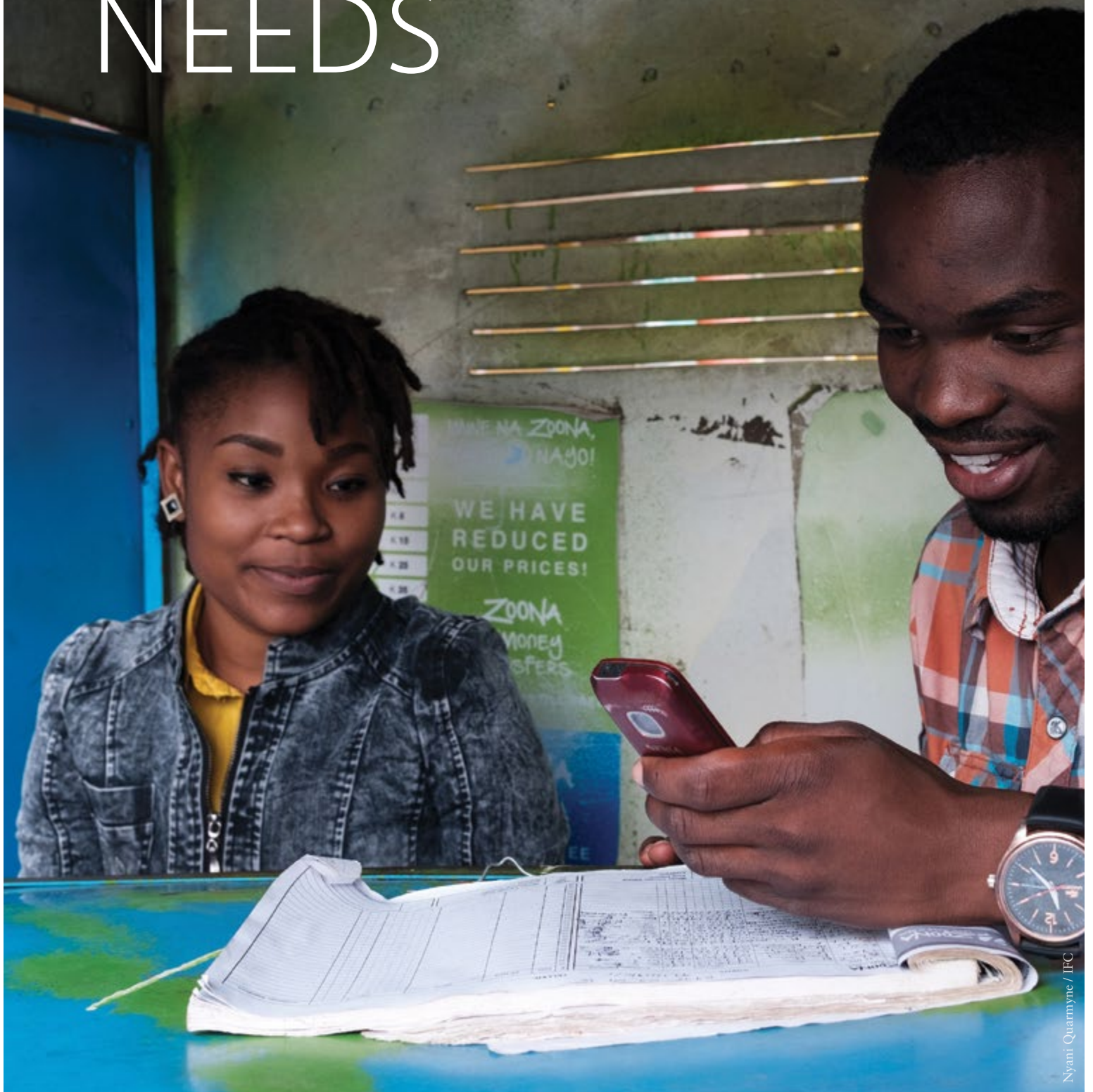
- ▶ Demonstrate knowledge of foundational and evolving best practices
- ▶ Demonstrate awareness of current issues in the field
- ▶ Demonstrate knowledge of the range of services your group can provide
- ▶ Match services with the appropriate client and situation
- ▶ Demonstrate high ethical and professional standards
- ▶ Suggest innovative solutions that meet the client’s needs

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Interactions with clients and other stakeholders	Client and stakeholder input is reflected
	Learning concepts are explained clearly and succinctly
	Alignment of learning to business strategy and priorities is explained
	Client terminology is used
	Discussion encourages participation and sharing
Feedback from client	Verbal and written feedback from client is positive

ASSESSING PERFORMANCE NEEDS



INTRODUCTION

Assessing Performance Needs can range from taking a few hours to clarify what participants should be able to do after a learning experience to conducting an in-depth needs assessment and training strategy for a complex performance issue that involves many work processes, functions, and roles.

Performance refers to behaviors that produce measurable results and indicate progress toward—or achievement of—an important outcome. At the individual level, this depends on clear expectations, meaningful feedback, and having the resources, skills, knowledge, and motivation to perform.

In this document, we use the terms “assessing” and “analyzing” interchangeably. *Assessing Performance Needs* is different from process improvement, where the focus is on making work procedures more efficient and effective, and it’s different from organization development, where the focus is on strengthening the functioning of groups. *Assessing Performance Needs* focuses on identifying the current and desired state of individual or organizational performance toward specific business goals, determining what is required to close gaps, clarifying limitations, identifying learning or performance solutions, and charting the plan for implementing those solutions.

Learning solutions may include classroom or online learning experiences, mentoring, coaching, and on-the-job training. Performance solutions could include clarifying expectations, providing timely feedback, improving equipment, improving processes or policies, or providing incentives. This assessment helps you determine whether the organization needs a performance solution instead of, or in addition to, a learning solution.

Competent assessment of performance needs increases the likelihood that you:

- Have facts that support assumptions.
- Address the right problems and causes.
- Avoid rushing into a learning solution.
- Identify the best solution or blend of solutions.
- Determine how to evaluate results.

Assessing Performance Needs in an emerging market requires thorough consideration of the local culture, economic conditions, available technology and infrastructure, safety concerns, and personal circumstances of participants. These factors can influence both what needs you assess and how you conduct the assessment. When you address these aspects directly, the resulting program is more likely to target the correct performance issues; therefore, your client and your participants are more likely to accept the program. As you prepare to assess performance needs, ask yourself the following big questions:

- What external influences (cultural, societal, or religious factors) impact program design, content participation, or delivery?
- Is there a gap between what men and women participants can afford to pay for the program?
- How can you mitigate infrastructure and technological limitations?
- What safety precautions for program participants, trainers, and support personnel do you need to provide before, during, and after the program?
- How do participants’ family caregiving responsibilities impact their time and ability to participate in the program?
- What psycho-emotional needs of program participants may require special attention?
- How can your curriculum support opportunities to access to finance?
- What regional post-program support opportunities can the program offer (for example, coaching, mentoring, and peer-to-peer and business networking)?

Assessing Performance Needs is the most complex of the competency categories. It is complex because, in addition to the key competencies outlined in the following pages, successful analysis also involves a number of other interrelated competencies. These include the competencies from *Partnering with Clients*. Other skills include:

adaptability, agility, analytical thinking, systems thinking, design thinking, conceptual thinking, ability to deal with ambiguity, and synthesis of disparate facts into a coherent whole.

While the primary focus in the *Assessing Performance Needs* competencies is the job level, you should also consider the process and organization levels when determining the causes of performance gaps and potential solutions.

The output for the *Assessing Performance Needs* competency is a Needs Assessment report, a training strategy, or both. A Needs Assessment report summarizes the findings of the assessment, characterizes the performance goals and gaps, and offers suggestions for ways to close the gaps. The training strategy summarizes the general strategic approach the organization will implement to close the gaps identified in the Needs Assessment report. It identifies which performance and learning solutions the organization is going to implement, the relationships between the various solutions, the success measurements, the long-term maintenance plan, the budget, timelines, resources, and roles and responsibilities of the project team members.

It serves as the basis for instructional designers and project management to make more detailed decisions during the *Designing Curricula* and *Designing Learning Experiences* phases.

Simple projects, such as creating a single learning experience, usually only need a Needs Assessment report. On the other hand, more complex projects, involving multiple learning experiences and integration with other non-learning performance improvement projects, typically require the longer-term and more project-oriented thinking that a training strategy report provides. Sometimes, business learning specialists combine the Needs Assessment report with the training strategy. However, it is also acceptable to provide them as two separate deliverables.

For additional information on *Assessing Performance Needs* when conducting training in fragile and conflict-affected situations and for gender-inclusive work, please refer to the FCS and gender supplements at the end of this guide.

ASSESSING PERFORMANCE NEEDS

COMPETENCIES AND SUPPORTING COMPETENCIES | This section contains information about the importance of mastering the competencies, tasks for each supporting competency, key outputs, and assessment criteria.

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 - 1a. Clarify the client perspective.....30
 - 1b. Gather initial information.....30
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- 2. IDENTIFY PERFORMANCE GAPS 32
 - 2a. Gather data to determine current and desired performance outcomes 32
 - 2b. Conduct job, competency, or goal analysis to determine desired performance outcomes..... 33
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 - Key outputs and assessment criteria.....34

- 3. DETERMINE CAUSES OF PERFORMANCE GAPS 35
 - 3a. Determine job-level causes 35
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- 4. IDENTIFY SOLUTIONS FOR CLOSING GAPS 37
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 - 4b. Select learning and other performance solutions38
 - 4c. Develop a plan to support the transfer of learning and sustained performance...38
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 - 4e. Develop a strategy for implementing the solution39
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- 5. VALIDATE NEXT STEPS AND MEASURES 41
 - 5a. Prepare needs assessment report 41
 - 5b. Prepare training strategy report..... 41
 - 5c. Present report to client.....42
 - 5d. Secure approval and support for recommended solutions42
 - Key outputs and assessment criteria.....43

1. Prepare to assess











Importance




The impact of mastering these competencies is that you:

- Focus on the needs of the participants and your client, and avoid a “knee-jerk” response to requests for a learning solution.
- Plan for an efficient and effective assessment of performance needs.
- Start building a partnership with your client.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

1a	Clarify the client perspective
<input type="checkbox"/>	Explore what the client thinks is actually happening versus what should be happening
<input type="checkbox"/>	Identify changes the client wants to see (for example, desired performance outcomes, behavior, values, attitudes)
<input type="checkbox"/>	Determine measurable business results from the program
<input type="checkbox"/>	Identify stakeholders who will influence the project, along with their roles and perspectives
<input type="checkbox"/>	Identify organizational realities and environmental factors that the client is facing
<input type="checkbox"/>	Confer with your client on recent political and social developments in the area and their possible impacts on the program and the safety of its participants 
<input type="checkbox"/>	Determine how the client will make decisions about recommended solutions
<input type="checkbox"/>	Address any client requests or concerns that could detract from a successful needs assessment
1b	Gather initial information
<input type="checkbox"/>	Determine the extent to which other stakeholders share the client’s perspective
<input type="checkbox"/>	Survey existing and past programs conducted in this or similar regions 
<input type="checkbox"/>	Determine availability and quality of local advisory services 
<input type="checkbox"/>	Map the ecosystem of programs in your region that target women or focus on gender inclusion 
<input type="checkbox"/>	Determine the sophistication of the private business culture in the region 
<input type="checkbox"/>	Identify the impact the business need has on resources available to develop the curriculum
<input type="checkbox"/>	Compare stakeholder and client insights on recent political and social developments in the area and their possible impacts on the program
<input type="checkbox"/>	Assess transportation options for program providers and participants and determine mobility constraints  
<input type="checkbox"/>	Examine local social views and belief systems 
<input type="checkbox"/>	Identify religious traditions and norms that a program must observe or accommodate
<input type="checkbox"/>	Determine implications of using a male or a female facilitator 
<input type="checkbox"/>	Determine how women’s legal status might impact the program 
<input type="checkbox"/>	Identify factors and constraints for care providers 

- ▶ Establish baseline economic data on participants
- ▶ Identify any economic issues that might interfere with program attendance or completion:
 - Determine affordability of your program for your client and participants  
 - Identify the effect of a fluctuating exchange rate on program fees for the participant and program providers 
- ▶ Confirm that the desired performance has the potential to affect business results
- ▶ Determine risk involved in implementing a proposed solution without conducting a needs assessment

1C Plan needs assessment

- ▶ Determine resources, time, and budget available and develop a project plan for the needs assessment
- ▶ Define the target audience for the program
- ▶ Determine particular constraints that might affect the needs assessment (for example, disruptions due to political unrest, safety or gender equality issues)
- ▶ Determine data required to identify causes of performance gaps and potential solutions
- ▶ Determine the most efficient, effective, and ethical methods for collecting data required
- ▶ Determine who should participate in providing data through focus groups, interviews and other data assessment techniques
- ▶ Plan sample size and distribution to collect valid and reliable data

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Plan for assessing performance needs	Plan includes rationale for assessing performance needs, resources required, budget, target audience to be studied, data required, rationale for data collection method(s), who should provide data, sample size, and distribution of data
	Plan includes comprehensive list of activities and timing, with clear roles and responsibilities plus approvals needed, as well as communication to stakeholders
	Plan provides guidelines on how to collect information in accordance with regional norms
	Plan describes proposed content of the needs assessment report
	Plan addresses needs and concerns of client and other stakeholders
	Plan is approved by client

2. Identify performance gaps









Importance

The impact of mastering these competencies is that you:

- Base interventions for improving performance on accurate, unbiased data.
- Have data about the existing state so that you can determine the impact of interventions to improve performance.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

2a	Gather data to determine current and desired performance outcomes
<input type="checkbox"/>	Review documentation (for example, job descriptions, process diagrams, incident reports, social media)
<input type="checkbox"/>	Observe performance (for example, user acceptance testing, client calls, daily routines) ‣ Build empathy for the participants by asking, observing and listening to their experiences
<input type="checkbox"/>	Gather data in a manner consistent with the cultural norms and technology infrastructure of the country ‣ Design and administer questionnaires, using print, phone, or web technology ‣ Conduct structured interviews and focus groups in person, by phone, or with web technology ‣ Use other forms of participatory research methods, for example, storytelling or scientific experimentation ‣ Determine contingencies in the event that an alternative data-gathering approach is required
<input type="checkbox"/>	Identify possible cause-effect relationships among performance gaps
<input type="checkbox"/>	Determine ways to support participants' psycho-emotional needs during performance needs analysis 
<input type="checkbox"/>	Assess how building leadership skills may benefit participants and program results 
<input type="checkbox"/>	Assess how building problem-solving skills may benefit participants and program results 
<input type="checkbox"/>	Assess the need to integrate confidence-building activities into the program and activities to reinforce participants' persistence and self-esteem  
<input type="checkbox"/>	Identify the importance of recognizing achievement in building self-confidence 
<input type="checkbox"/>	Identify values that are most likely to resonate with participants and confirm with client
<input type="checkbox"/>	Consider participant demographics and eligibility criteria for the program 
<input type="checkbox"/>	Address confidentiality and privacy issues during data-gathering; in particular, identify potential unintended implications of training for participants in general and female participants in particular 
<input type="checkbox"/>	Manage deviations from plan so that data are not contaminated

2b Conduct job, competency, or goal analysis to determine desired performance outcomes

- ▶ Determine which type of analysis (job, competency, or goal analysis) to conduct

- ▶ Work with subject matter experts and conduct job analysis to:
 - Determine functions and tasks for specific roles
 - Determine performance standards for tasks
 - Identify how to adjust roles to minimize overlap and clarify accountability for all key functions and tasks

- ▶ Work with subject matter experts and conduct competency analysis to:
 - Determine an overall structure or framework for competencies
 - Identify competencies and sub-competencies within the structure or framework

- ▶ Work with subject matter experts and conduct goal (topic) analysis to:
 - Identify specific tasks related to a goal or topic (for example, teamwork, communication, supervision)
 - Determine performance standards for tasks

2c Identify desired performance outcomes and business measures

- ▶ Write statements describing:
 - The desired observable performance outcome from the participant
 - The conditions under which the participant may achieve the outcome, taking into account personal finances and household obligations of prospective participants
 - The associated business measures that gauge the impact of the participants' change in performance and show the relationship between individual performance and organizational performance
 - Existing business measures that will indicate whether the business or organization outcome has been achieved

- ▶ Validate desired performance outcomes and business measures

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Job, competency or goal analysis	Appropriate method of analysis is used
	Job analysis: <ul style="list-style-type: none"> ▸ Identifies functions and tasks for specific roles ▸ Identifies performance standards for tasks ▸ Clearly states tasks using active and appropriate verbs
	Competency analysis: <ul style="list-style-type: none"> ▸ Identifies competencies and supporting competencies within a structure or framework ▸ Clearly states competencies using active and appropriate verbs
	Goal (topic) analysis: <ul style="list-style-type: none"> ▸ Identifies specific tasks related to a goal or topic ▸ Identifies performance standards for tasks ▸ Clearly states tasks using active and appropriate verbs
Analysis of performance gaps and opportunities to improve performance	Analysis identifies gap(s) between current and desired performance outcomes
	Analysis is stated in terms of specific performance outcomes
	Performance outcomes state observable outcome desired and conditions under which participants can achieve the outcome, including conditions related to legal environment, security, personal resilience, personal finances, and household obligations
	Analysis identifies business measures and targets that will indicate whether the program has helped to achieve desired performance and business outcomes
	Analysis is based on accurate and reliable data
Analysis determines cause-effect relationships among performance gaps	

3. Determine causes of performance gaps

Importance

The impact of mastering these competencies is that you:

- Offer an explanation for performance gaps that is rooted in data collected.
- Take a comprehensive approach to analyzing performance at the job, process, and organization level.
- Recommend learning and other performance solutions, and explain how they address causes of performance gaps.


Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

3a Determine job-level causes

▶ Review data from documentation, observation of performance, structured interviews, focus groups, or questionnaires

▶ Analyze data to determine extent to which performance is affected by:

- ▶ Expectations that are unclear or seen as unrealistic
- ▶ Feedback that is not specific and timely
- ▶ Tools and resources that are not effective and efficient
- ▶ Consequences that, on balance, do not support performance
- ▶ Incentives that, on balance, do not support performance
- ▶ Participants' knowledge, skills and ability, including their skills using technology 

3b Determine process-level causes

▶ Review data from documentation, observation of performance, structured interviews, focus groups, or questionnaires

▶ Analyze data to determine extent to which performance is affected by:

- ▶ Work processes or procedures that do not support desired performance outcomes (for example, being too complicated to follow, inefficient, overlapping with other areas)
- ▶ Technology that does not perform as expected or that users have difficulty using as intended

3C Determine organization-level causes

- ▶ Review data from documentation, observation of performance, structured interviews, focus groups, or questionnaires
- ▶ Identify any macro-economic issues that might interfere with participants attending or completing the program and consider how to mitigate them
- ▶ Analyze data to determine extent to which performance is affected by:
 - ▶ Organizational structure that does not support job-level performance
 - ▶ Desired performance outcomes that are not aligned with business strategies
 - ▶ Desired performance outcomes that are not aligned with vision and values
 - ▶ Lack of access to mentors or coaches
 - ▶ Insufficient support from external business networks

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
List of causes of performance gaps	Causes are based on accurate and reliable data and sound analysis
	List considers all likely causes at a job, process, and organization level, as well as indirect causes related to country, individual, or family context
	List of causes identifies cause-effect relationships among the various causes

4. Identify solutions for closing gaps









Importance

The impact of mastering these competencies is that you:


- Identify learning and other performance solutions that address causes of performance gaps.
- Take a comprehensive approach to identifying solutions at the job, process, and organization level.
- Make recommendations based on sound decision-making principles and the best available data.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

4a	Identify potential solutions for closing performance gaps
▶	Set priority on which performance gaps to address first
▶	Identify performance solutions, as required (for example, process improvement, leadership endorsement, role clarification, incentives, web-based tools, technology changes, endorsement and support by key community influencers)
▶	Identify learning solutions, as required (for example, facilitated classroom or e-classroom sessions, online learning, on-the-job training, job shadowing, job aids, peer support, videos)
▶	Identify alternatives to face-to-face-learning  
▶	Identify any economic issues that might interfere with participants attending or completing the program or course and consider how to mitigate them: <ul style="list-style-type: none"> ▶ Determine local costs to use technology to deliver the solution (for example, cost of internet, SMS connectivity, transit to location of digital devices)
▶	Identify likely technological failures at the program venue and possible mitigation strategies:  <ul style="list-style-type: none"> ▶ Determine what contingencies are available in the event of such failures ▶ Determine back-up equipment ▶ Assess appropriateness of alternative training approaches in the event of a technological failure
▶	Identify appropriate communication channels to reach prospective participants and inform them of upcoming program
▶	Examine unintended consequences of the program on participants, including violence 
▶	Assess need to provide women role models 
▶	Determine viability of coaching and/or mentoring 
▶	Determine the influence of social networks and peer learning 
▶	Identify household decision makers to consult in connection with your program 

4b Select learning and other performance solutions

- ▶ Determine criteria for evaluating alternative solutions (for example, potential impact on performance gaps, cost to design, cost to implement)
 - Assess how existing political, social, economic and safety factors are likely to impact program content and its acceptance and application 
- ▶ Gather data to assess alternative solutions against the set of criteria
- ▶ Determine which solutions best meet the criteria
- ▶ Identify dependencies among all solutions recommended
- ▶ Verify that solutions are accessible (for example, meeting needs of visual or hearing impairments, medical conditions, physical disabilities, learning disabilities)
- ▶ Identify when change management support is required
- ▶ Assess risks associated with implementing each of the preferred solutions

4c Develop a plan to support the transfer of learning and sustained performance

- ▶ Assess environment to determine feasible options for supporting the transfer of learning
 - Identify available alternatives to reinforce learning after the program is completed and confirm longer-term impact
 - Reinforce training through distance education or other means, if feasible, after the instructor-led training is completed
- ▶ Recommend initiatives to support transfer (for example, communication of expectations, reminders, feedback mechanisms, follow-up activities, coaching/mentoring support, incentives)
- ▶ Determine resources required to support the transfer of learning
- ▶ Determine how technology can support the transfer of learning (for example, automated reminders, online performance tracking, links to support)

4d Develop a plan to evaluate the transfer of learning and business results for learning solutions

- ▶ Identify pre-program (benchmark) performance outcomes and business measures
- ▶ Recommend how to assess post-intervention performance and business results against benchmark data
- ▶ Determine timing and required resources for evaluation

4e Develop a strategy for implementing the solution

- ▶ Determine the resource needs to develop the solution
- ▶ List the learning and other performance solutions required to close the performance gaps
- ▶ Identify the goal or purpose for each solution or learning experience
- ▶ List the roles and responsibilities for each project team member responsible for developing the solution
- ▶ Create a schedule for developing the solution
- ▶ Create a budget for developing the solution
- ▶ Identify the methods to assist participants in transferring (applying) the learning to their real world situations
- ▶ Identify the key performance indicators needed to determine the success of the solution
- ▶ Identify the resources and responsible parties needed to operate, maintain, and sustain the program after the initial delivery

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
List of potential performance solutions in order of priority	List identifies how each solution will address causes of specific performance gaps to achieve desired performance outcomes
	List identifies dependencies on other solutions recommended
	Solutions include descriptions of actions required to implement each solution
	Solutions include estimate of resources and technology required
	Solutions identify desired individual performance outcomes
	Individual performance outcomes align with needed organizational performance outcomes

KEY OUTPUTS	ASSESSMENT CRITERIA
Learning solutions component of the training strategy report	Report identifies recommended solutions
	Report identifies how each solution addresses causes of specific performance gaps to achieve desired performance and business outcomes
	Report identifies dependencies and connections to other solutions recommended
	Solutions include descriptions of actions required to implement each solution
	Solutions include high-level purpose and goals
	Solutions include an estimate of the required resources, time, and technology
	List of goals reflects the perspectives of all stakeholders
	Clearly stated and regionally appropriate design principles and adaptations to them along with rationale for choosing them
	Distinct groups of participants are clearly profiled
	Impact of current and future technology identified, relevant to regional context
	List of interdependencies and constraints is comprehensive, including availability of networks, coaches, and mentors to support the program and relationship of program with access to finance
Plan for supporting the transfer of learning	Plan includes realistic solutions for the transfer and application or learning from the classroom to the workplace, based on desired performance outcomes
	Plan identifies resources and time required to implement support for the transfer of learning
	Plan includes communication and follow-up activities
	Plan identifies technology to support the transfer of learning
Plan to evaluate the transfer of learning and business results	Plan identifies who will gather and analyze which data
	Plan identifies when to conduct evaluations
	Plan includes benchmarks of pre-program performance and business results
	Plan addresses who enters data and where the organization stores the evaluation data
	Plan includes estimate of resources required to implement evaluation plan

5. Validate next steps and measures

Importance

The impact of mastering these competencies is that you:

- Build support for the effective implementation of learning and other performance solutions.
- Identify which solutions to implement and their order of priority in consultation with the client.
- Set the stage for evaluation against specific business measures and desired performance outcomes.
- Identify priority tasks for learning.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

5a	Prepare needs assessment report
<input type="checkbox"/>	Prepare executive summary for the report
<input type="checkbox"/>	Present current and desired business goals
<input type="checkbox"/>	Present current and desired performance goals
<input type="checkbox"/>	Present participants' current and desired knowledge goals
<input type="checkbox"/>	Present participants' needs and limitations for participation in program
<input type="checkbox"/>	Present recommended options for learning and other performance solutions based on key findings
<input type="checkbox"/>	Present recommended options for supporting the transfer of learning
<input type="checkbox"/>	Explain purpose of needs assessment
<input type="checkbox"/>	Summarize key findings of needs assessment
<input type="checkbox"/>	Describe implications of not addressing the performance gaps
<input type="checkbox"/>	Describe process followed to conduct the needs assessment
5b	Prepare program strategy report
<input type="checkbox"/>	Prepare executive summary for the report
<input type="checkbox"/>	Present recommendations for learning and other performance solutions based on key findings
<input type="checkbox"/>	Identify the target audience for each solution or learning experience and determine whether participation is mandatory
<input type="checkbox"/>	Present recommendations for supporting the transfer of learning
<input type="checkbox"/>	Present desired performance outcomes and recommended business measures
<input type="checkbox"/>	Present recommendations for evaluating solutions
<input type="checkbox"/>	Present recommendations for how to assess participant reaction, learning objectives, and transfer of learning (application) at an aggregate level
<input type="checkbox"/>	Prepare draft implementation plan, including budget and work schedule

-
- ▶ Present list of roles and responsibilities for everyone involved in creating the solution
 - ▶ Present recommendations for sustaining the program in the long-term or, at a minimum, include a list of questions for the client to answer to create a plan for the long-term sustainment of the program
-

5c Present report to client

- ▶ Prepare agenda for meeting with the client and key stakeholders
 - ▶ Present highlights of needs assessment report
 - ▶ Facilitate discussion with the client and key stakeholders
 - ▶ Respond to questions and address concerns
 - ▶ Confirm how and when the client will make decisions regarding recommendations
 - ▶ Confirm next steps and actions for advancing the plan
-

5d Secure approval and support for recommended solutions

- ▶ Incorporate modifications from client and key stakeholders
- ▶ Confirm with client the priority tasks or competencies for learning
- ▶ Validate implementation plan with client

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Needs assessment report	Report includes executive summary, purpose, process, key findings, potential performance outcomes and recommended business measures, and implications of not addressing performance gaps
	Report updated to include modifications based on feedback from the client and key stakeholders
Presentation of needs assessment report	Presentation begins with an agenda
	Presentation highlights recommended learning and other performance solutions based on key findings
	Presentation provides an opportunity for client and stakeholders to ask questions
	Presentation addresses client's and stakeholders' questions and concerns
Program strategy report	Report includes executive summary, purpose, recommended solutions, success measures, workplan and budget for developing the program, workplan and budget for delivering the program, workplan and budget for sustaining the program, workplan and budget for evaluating the program, key roles and responsibilities, rationale for recommended learning and other performance solutions, target audience for learning, and whether learning is mandatory
	Report updated to include modifications based on feedback from the client and key stakeholders
Presentation of program strategy report	Presentation begins with an agenda
	Presentation highlights recommended learning and other performance solutions based on key findings
	Presentation addresses budget and schedule questions
	Presentation provides an opportunity for client and stakeholders to ask questions
	Presentation addresses client's and stakeholders' questions and concerns

DESIGNING CURRICULA



INTRODUCTION

Designing Curricula refers to the design of frameworks for interrelated learning experiences, activities, and material intended to build competence for participants over an extended period. Learning experiences might happen face-to-face, online, or a blend of both. An effective curriculum is more than a collection of learning experiences. It may include other experiences, such as structured observation and practice, internships and job rotations, or informational materials, such as guidebooks and job aids.

Designing a curriculum is important when:

- People need to learn a body of knowledge or gain a comprehensive set of skills or competencies.
- The policies, processes, or systems of an industry, organization, or line of work change substantially (for example, the digitization of an industry).
- A number of individuals or cohorts are hired for a role.
- An existing role is changing significantly or new products and services are being launched.
- The learning path to progress from one career or job level to the next, or to maintain currency in a profession, needs to be defined.

The curriculum makes the high-level training strategy more concrete and tactical and acts as a visual roadmap to progress through the learning. The roadmap shows linkages among the curriculum's various components, from business measures and program goals to performance and other outcomes, learning objectives, related learning activities, and evaluation.

Business measures help determine whether the learning has helped the organization close its operational gaps. Performance objectives address the specific behaviors participants need to adapt in the “real world.” Ideally, if participants adapt the new behaviors, it should have the combined effect of closing business gaps. Program goals address broader issues of personal and professional development that can be harder to describe in observable

and measurable terms, for example, “develop a professional identity” or “become a champion for the product line.” Program participants achieve these goals as they go through the curriculum. Performance outcomes differ from learning objectives, which describe what people do while learning and usually apply to just one component of the curriculum. A well-designed curriculum aligns all these different goals and measures with the content and activities of the program.

Competent curriculum design increases the likelihood that you:

- Sequence learning objectives and performance outcomes, so that participants can start applying new knowledge on the job as soon as possible.
- Sequence learning to optimize retention.
- Identify and integrate other goals (for example, personal development or understanding) where feasible.
- Identify the most effective formats and channels for participants.
- Identify a specific path for each job role or experience/education/skill level.
- Identify ways to potentially reuse components of the curriculum at the start of the project, thereby promoting efficiency in developing experiences and materials.
- Specify guidelines, templates, and similar resources to promote consistency during development.
- Integrate cognitive and psychomotor learning effectively.
- Pilot and test various components of the curriculum before full-scale development or rollout of all the experiences and materials.

Effective curriculum design requires you to approach learning as an overall system with the various components working together to develop performance.

In emerging markets, the local culture, economic circumstances, availability of technology, reliability

of infrastructure, and accommodation of personal circumstances, educational levels, and post-training support requirements add complexity to the task of *Designing Curricula*. Addressing these challenges directly results in a curriculum that is better suited to participants' circumstances and more feasible for them to complete.

As you prepare to design, ask yourself the following questions:

- How can you adapt the curriculum and the program content for the local context and audience?
- What digital solution would enhance participants' learning (for example, webinars, social media)?
- How can you design a program that is affordable and sustainable despite potential economic fluctuations?
- Do participants need safety and security training/briefings?
- How can the program contribute toward development of personal resilience and the confidence of participants?
- What coaching or mentoring services can support application of learning?
- What remedial training or assistance might you need to bolster participants' baseline skills to acceptable levels for the program?

The decision to design a curriculum is usually the result of a preliminary assessment of performance needs. However, it is also important to identify specific performance outcomes, which involves assessing performance needs in more detail, and so we include this as one of the initial competencies in this category. *Designing Curricula* is a complex process that requires extensive experience in assessing performance needs and designing learning experiences. For this reason, experienced business learning specialists usually perform curriculum design.

The output for the *Designing Curricula* competency is a Design Document. The Design Document translates the high-level training strategy into a development guide with the tactical details required to create the curriculum or learning experience. It provides lower-level learning objectives, learning experience outlines, and summaries of learning activities within a learning experience. It identifies the duration of each section of the learning experience and identifies how to measure successful completion of each related learning objective. In essence, it is a blueprint or a roadmap for the *Designing Learning Experiences* competency.

For additional information on *Designing Curricula*, when conducting training in fragile and conflict-affected situations and gender-inclusive training, please refer to the FCS and gender supplements at the end of this guide.

DESIGNING CURRICULA

COMPETENCIES AND SUPPORTING COMPETENCIES | This section contains information about the importance of mastering the competencies, tasks for each supporting competency, key outputs, and assessment criteria.

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1. Identify goals, principles, and constraints

Importance

The impact of mastering these competencies is that you:


- Base design on both the explicit and implicit goals of the stakeholders.
- Follow established best practices in design.
- Base design on the real needs of the various learner groups.
- Identify interdependencies and constraints early in the design process.

Supporting competencies and tasks


These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

1a	Consult with stakeholders to clarify the business need and goals of the curriculum
<input type="checkbox"/>	Determine the stakeholders to involve
<input type="checkbox"/>	Confirm with stakeholders the need and measures that the curriculum is intended to affect (for example, generate revenue, contain expenses, comply with government/industry/organization guidelines)
<input type="checkbox"/>	Identify the impact the business need has on resources available to develop the curriculum
<input type="checkbox"/>	Confirm the potential goals (for example, minimize time to competence, increase engagement, develop organization values, compete for talent, increase profile of learning function)
<input type="checkbox"/>	Resolve areas of disagreement among stakeholders
1b	Establish overall design principles
<input type="checkbox"/>	Explain the rationale for the chosen educational philosophy, design approach, and design process, for example: <ul style="list-style-type: none">▸ Activities to reinforce participants' persistence, self-esteem, and confidence ▸ Activities to build participants' confidence, leadership skills and problem-solving skills ▸ Incorporating women role models ▸ Incorporating coaching and/or mentoring ▸ Incorporating social networks and peer learning 
<input type="checkbox"/>	Consider any financial constraints of the program 
<input type="checkbox"/>	Align learning with social and cultural norms 
<input type="checkbox"/>	Determine security precautions for facilitators and participants 
<input type="checkbox"/>	Embed flexibility in the program design 
<input type="checkbox"/>	Consider time constraints of participants 
<input type="checkbox"/>	Consider participants family responsibilities 

1c Profile identified groups of participants

- ▶ Profile various groups of participants (for example, participants with or without previous experience, participants hired internally or externally, different demographic groups, participants with different goals)
- ▶ Consider decision-making/agency and how to engage those family members who determine participation in your program 
- ▶ Identify resources available to participants (for example, physical work environment, interactions with others, available tools, capabilities of mentors)
- ▶ Determine the desired proficiency levels of the participants once they successfully complete the curriculum (for example, “qualified to operate the machinery” or “power user”)
- ▶ Identify remedial training or assistance if education levels need bolstering
- ▶ Design optional pre-program courses to bring participants’ baseline skills up to acceptable levels for the program

1d Consider potential of available technology to support curriculum

- ▶ Identify potential for producing learning experiences and materials for either face-to-face or online learning using specialized authoring and audiovisual production technologies
- ▶ Determine suitable digital learning delivery methods that could reduce the need for face-to-face contact and travel and digital tools for applying a skill or knowledge from the training
 - ▶ Determine how various digital solutions would meet the needs of participants, for example, their learning preferences or access to digital tools for reference after the program
 - ▶ Evaluate whether there are barriers to overcome to deliver trainings via technology for participants (for example, not knowing how to use technology, trust in technology, etc.)
 - ▶ Determine whether the use of digital solutions would enable more participants to join the program or receive program materials (for example, scaling the delivery and multiplier effect)
 - ▶ Determine viable digital solutions for participants 
 - ▶ Identify the owners of the access to technology and whether permission is needed from anyone (if so, find out from whom and what kind of permission)
 - ▶ Identify who to involve in digital support
- ▶ Identify communication channels to reach prospective participants and inform them of upcoming training
 - ▶ Use language in the marketing materials that is appropriate for the target group
 - ▶ Identify stakeholders who could promote this training
- ▶ Identify potential for electronically (or digitally) managing development workflows and providing content with enterprise learning technologies
- ▶ Identify potential for managing, personalizing, and tracking participants’ learning experiences and materials with enterprise learning technologies
- ▶ Identify potential for ongoing communication and learning offered through social media
- ▶ Identify potential for distributing learning experiences and materials by internet-connected devices (for example, smartphones, tablets, laptop computers)
- ▶ Identify organizational policies on use of technology that could affect design of the curriculum

1e Identify interdependencies and constraints

- ▶ Consider how location, geography, and number of participants affect the design
- ▶ Determine how local networks can support or reinforce performance training
- ▶ Design the program to allow participants to interact with local leaders
- ▶ Establish fees that are not too expensive to prohibit attendance or participation in activities, but are high enough to have participants take the program seriously and consider it something of value
- ▶ Consider how timing, budget, resources, and quality requirements affect the design
- ▶ Consider how continuing education, certification, or legislative requirements affect the design
- ▶ Consider how other current and anticipated organization initiatives affect the design (for example, product launches, changes to technology or regulatory requirements, role redesign)

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Summary section of the Design Document	Section describes briefly the design principles that are central to the learning approach for the curriculum
	Section summarizes the sequence of the learning experiences within the full curriculum
	List of learning experiences identifies the target audience and profile for each experience
	Section describes the required technologies for the learning experiences
	Section describes the link between each learning experience and related non-learning solutions (for example, mentoring, coaching)

2. Create a high-level roadmap for the curriculum



Importance

The impact of mastering these competencies is that you:

- Structure and sequence the curriculum based on outcomes and goals.
- Identify how and when to assess and validate proficiency.
- Document learning best practices to guide the design.
- Ensure that you consider how to sustain performance over time.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

2a	Identify desired performance and other outcomes <ul style="list-style-type: none"> ▶ Review desired performance and other outcomes (see Assessing Performance Needs 2a) ▶ Emphasize importance of performance and other outcomes to participants ▶ Identify motivational reasons to adopt the taught behaviors and content
2b	Sequence performance and other outcomes <ul style="list-style-type: none"> ▶ Determine the order content should flow within each learning experience and between learning experiences ▶ Set priorities, determine prerequisites and dependencies, and define performance and other desired outcomes ▶ Identify assessment checkpoints along the way to confirm proficiency
2c	Identify potential learning and other performance solutions for achieving desired outcomes <ul style="list-style-type: none"> ▶ Identify potential learning and other performance solutions for closing performance gaps or achieving other desired outcomes (see Assessing Performance Needs 4a) ▶ Select learning and other performance solutions to achieve outcomes (see Assessing Performance Needs 4b) ▶ Identify support required for learning (for example, online forums, peer and business-to-business networking, crowd sourcing of materials, coaching and mentoring) ▶ Determine a realistic overall timeframe for participant completion of curriculum
2d	Determine the sequence of learning experiences for identified groups of participants <ul style="list-style-type: none"> ▶ Determine points of entry to the curriculum, based on prior experience or learning, and ways to support participant entry (for example, provision of remedial training)  

1. Identify goals, principles, and constraints

2. Create a high-level roadmap for the curriculum

3. Design a detailed roadmap for the curriculum

4. Prototype curriculum components

5. Prepare to implement and sustain the curriculum

2e Determine how technology and tools can support the curriculum

- ▶ Determine reliability of technological infrastructure in the regions (for example, prevalence of brownouts or blackouts, bandwidth issues, media censorship)
- ▶ Determine the types of devices to use to support the program (for example, smartphones, tablets, classroom polling devices)
- ▶ Determine how to use technology to store and deliver content
- ▶ Determine how to use technology to promote communication and collaboration among participants and facilitators
- ▶ Determine how to use technology for assessment and testing
- ▶ Determine how to use technology to personalize experiences and resources for different groups of participants

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Structured list of goals for each experience within a curriculum	Performance outcomes state observable outcome and conditions under which outcomes are achieved
	Other desired outcomes are stated as concretely as possible
	List reflects needs and issues identified in the assessment
High level roadmap for the curriculum	The Roadmap <ul style="list-style-type: none">▶ Is consistent with identified goals, interdependencies, and constraints▶ Identifies any prerequisites▶ Identifies all required and optional components of the curriculum▶ Shows progression through the curriculum▶ Shows alternative paths for identified groups of participants, where appropriate▶ Identifies the goals of the learning experience▶ Shows assessment checkpoints and identifies when participants should be proficient in specific performance outcomes▶ Shows timing of components and curriculum as a whole▶ Explains how to use technology to support the curriculum and provides alternatives in the event of technological failure▶ Identifies support needed within the work environment▶ Reflects planned organization initiatives (for example, product launches, changes to technology or regulatory requirements, role redesign)
	All design choices align with overall goals, performance and other desired outcomes, resources available, and accepted best practices in performance and learning

3. Design a detailed roadmap for the curriculum

Importance

The impact of mastering these competencies is that you:

- Link learning objectives and activities to performance and other outcomes.
- Select the most effective and efficient formats and delivery channels for learning.
- Make effective use of available resources to design and develop learning experiences and materials.
- Create curriculum components that participants can easily access.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

3a	Establish preliminary learning objectives for each curriculum component <ul style="list-style-type: none"> Identify the appropriate level of learning for each lesson's or task's learning objective (such as remembering, understanding, applying, analyzing, evaluating, creating) Write statements describing: <ul style="list-style-type: none"> ▸ The observable outcome for each key skill or knowledge requirement ▸ The conditions under which to perform the task ▸ The standards of acceptable performance Sequence learning objectives for ease of learning Validate learning objectives for accuracy and sequence Align learning objectives with performance and other outcomes Determine minimum criteria for successful completion of stages or phases of learning
3b	Clarify format for each curriculum component <ul style="list-style-type: none"> Determine the purpose of each curriculum component (for example, general awareness, skill practice, transfer of learning) Identify options for formats and their typical uses (for example, a live or self-study course, user guide, job aid, online support resource) Identify expectations participants bring to the format (for example, type of information included, how it is structured, writing style)
3c	Determine delivery channel for each curriculum component <ul style="list-style-type: none"> Identify options for delivery channel(s) (for example, classroom, virtual classroom, job aid, web-based learning, videos, social learning) Select appropriate channel(s) based on criteria Create smaller training segments and alternative training methods to embed flexibility into the program design to address potential disruptions or technological challenges

1. Identify goals, principles, and constraints


2. Create a high-level roadmap for the curriculum

3. Design a detailed roadmap for the curriculum

4. Prototype curriculum components

5. Prepare to implement and sustain the curriculum

3d Develop initial content inventory for curriculum

- ▶ Identify content to include for each component, using preliminary learning objectives as a guide
- ▶ Determine criteria for assessing usability of existing resources (for example, relevance, accuracy, alignment with learning objectives, age of resources)
- ▶ Determine the languages to use to write and deliver the program
- ▶ Review existing materials to determine what to reuse or adapt
- ▶ Obtain a legal review of program content 
- ▶ Determine what third-party materials to use as they are or with modification
- ▶ Determine what new content to develop specifically for the curriculum

3e Plan learning environment for the curriculum

- ▶ Plan how participants will access curriculum components
- ▶ Plan how participants and others (for example, managers, learning and development group) will track progress through the curriculum
- ▶ Develop a visual roadmap for participants to follow
- ▶ Consider how to foster the social component of learning, as appropriate
- ▶ Plan for accessibility to address needs of all participants

- 1. Identify goals, principles, and constraints
- 2. Create a high-level roadmap for the curriculum
- 3. Design a detailed roadmap for the curriculum
- 4. Prototype curriculum components
- 5. Prepare to implement and sustain the curriculum

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Detailed curriculum roadmap	Roadmap identifies each component of the curriculum
	Learning objectives include an observable behavior condition and standard
	Learning objectives align with performance outcomes
	Roadmap identifies an appropriate format for each component that addresses the learning objectives
	Roadmap identifies an appropriate, effective and easily accessible delivery channel for each learning experience
	Proposed evaluation methods are appropriate to the level of learning objectives
	All design choices align with overall goals, performance and other desired outcomes, resources available, and accepted best practices in performance and learning
Initial content inventory	Inventory identifies existing internal and third-party materials to reuse or adapt and which materials to design and develop
Plan for learning environment	Participants can easily access the components of the curriculum
	Participants can see all the learning experiences that comprise the full curriculum
	Participants and others can track progress through the curriculum
	Participants' accessibility needs are met

4. Prototype curriculum components

Importance

The impact of mastering these competencies is that you:

- Make improvements based on designing and testing prototypes.
- Determine how to “scale up” efficiently.
- Develop materials with a consistent look and feel.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

4a	Design at least one example of each curriculum component as a prototype
<input type="checkbox"/>	Generate a broad range of possible solutions
<input type="checkbox"/>	Create and get input on a series of quick prototypes
<input type="checkbox"/>	Test to inform the next iteration of prototypes
4b	Determine style guidelines for ensuring consistency across subsequent design and development
<input type="checkbox"/>	Determine standards for text (for example, voice, use of terminology, editorial style)
<input type="checkbox"/>	Determine standards for visuals (for example, colors, style of illustration)
<input type="checkbox"/>	Determine a standard approach for each component (for example, job aids, user guides, videos, e-learning, websites)
<input type="checkbox"/>	Determine appropriate technology and e-learning standards
<input type="checkbox"/>	Incorporate corporate branding, if appropriate
4c	Develop templates based on the validated templates and guidelines
<input type="checkbox"/>	Develop templates for each type of component
<input type="checkbox"/>	Develop templates for category of content within components (for example, presentation of text or text and visuals, multiple-choice questions)
<input type="checkbox"/>	Build standardized text into templates (for example, instructions and headings, other standard wording)
<input type="checkbox"/>	Confirm that templates comply with style guidelines
<input type="checkbox"/>	Confirm that templates comply with relevant technology and e-learning standards
<input type="checkbox"/>	Confirm that templates work with the chosen authoring tools

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Prototypes of curriculum components	Prototypes illustrate look and feel of materials and visual aids
	Prototypes comply with corporate branding, templates, and guidelines
	Technology and other logistics work, with backup strategies in place in case of failure
	Guidelines for ensuring consistency of design and materials are documented
Guidelines for creating consistent components	Guidelines identify definitions and preferred uses of terms for curriculum, as well as terminology to avoid
	Guidelines include a glossary of acceptable synonyms to guide translators in consistent terminology usage, when offering a program in multiple languages
	Guidelines provide consistent text for frequently used instructions
	Guidelines identify the preferred and culturally appropriate stylistic choices for the curriculum, reflecting the client's needs
	Guidelines are clear and thorough
Templates	Templates are provided for each major curriculum document type (for example, facilitator guides, job aids)
	Templates comply with guidelines for ensuring consistency
	Templates work with the chosen authoring tools for the curriculum
	Templates comply with relevant technology and e-learning standards
	Templates address issues of activities, images and image styles, formatting, fonts, colors and layout

5. Prepare to implement and sustain the curriculum

Importance

The impact of mastering these competencies is that you:

- Implement the curriculum successfully
- Prepare participants to transition easily from a previous curriculum to the new curriculum
- Maintain and sustain the curriculum over time

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

5a	Plan for implementation of the curriculum
<input type="checkbox"/>	Determine scope, budget, and timeline for implementation
<input type="checkbox"/>	Plan for the organizational structure and resources required to deliver and manage the curriculum
<input type="checkbox"/>	Plan for staged implementation, considering when various components should become available
<input type="checkbox"/>	Plan for transition of those who have started an earlier version of the curriculum but have not yet finished
<input type="checkbox"/>	Determine when and how to end use of the previous curriculum, if relevant
<input type="checkbox"/>	Plan for technical and administrative support for the curriculum (for example, in-person support for self-study components or training and support of facilitators)
<input type="checkbox"/>	Advise on communications and marketing activities to promote the curriculum
<input type="checkbox"/>	Test technology and other logistics
5b	Plan for validation of the curriculum
<input type="checkbox"/>	Determine what components of design and materials need validation
<input type="checkbox"/>	Determine approach for validation (for example, small group validation, full group pilot)
<input type="checkbox"/>	Determine the appropriate mix of stakeholders to validate the curriculum and detailed content
<input type="checkbox"/>	Plan for revising components based on results of the validation
5c	Plan for evaluating both the components and the curriculum as a whole
<input type="checkbox"/>	Determine method to evaluate participants' reactions
<input type="checkbox"/>	Determine method to evaluate participants' comprehension or learning
<input type="checkbox"/>	Determine method to evaluate participants' transfer (application) of learning
<input type="checkbox"/>	Determine method to evaluate the impact of the curriculum on business goals

5d Plan for maintaining the curriculum

- ▶ Plan how and when to update curriculum
- ▶ Plan how the curriculum can evolve based on needs of the client’s business and needs of participants
- ▶ Establish roles and responsibilities for maintaining the curriculum

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Implementation plan	Includes rationale for approach, resources required, budget, and comprehensive list of activities and timing, with clear roles and responsibilities
	Addresses needs and concerns of client and other stakeholders
	Addresses transition from the previous to the new curriculum, if relevant
	Addresses providing technical and administrative support for the new curriculum to both participants and trainers/facilitators
	Includes proposals for announcing and promoting the new curriculum
	Addresses validation of components and the curriculum as a whole
	Is approved by client
Maintenance plan	Addresses ongoing maintenance of content
	Addresses how to effectively integrate additions to the curriculum
	Is approved by client

DESIGNING LEARNING EXPERIENCES



INTRODUCTION

Designing Learning Experiences can range from creating a 15-minute self-paced e-learning tutorial on using a new software application to setting up a social platform for employees to learn from each other or creating instructor-led training delivered in a classroom or even in a field. Content can range from highly technical skills to skills like project management or sales, “softer” skills like communication, and “basic” skills like financial literacy.

Designing Learning Experiences is also referred to as “instructional design,” “training design and development,” or “course development.” Traditionally, people who design learning experiences have been referred to as “instructional designers” or business learning specialists.

Competent design of learning experiences increases the likelihood that you:

- Align learning objectives with desired performance outcomes and business measures.
- Include “need to know” content instead of “nice to know.”
- Present content clearly and concisely.
- Provide frequent and effective practice opportunities.
- Create materials that support learning.
- Create tools and methods to measure the participants’ new skills and knowledge.
- Create tools and methods to measure how much learning participants use in the “real world.”
- Design learning experiences that enable your facilitators and participants to succeed.
- Prepare for delivery.

When *Designing Learning Experiences* for emerging markets, culture, economics, safety concerns, personal circumstances, educational levels, and household obligations add to the challenge of this task. When you address these challenges directly, there is greater likelihood of producing a pragmatic

course from which participants can learn efficiently and effectively. As you prepare to design, ask yourself the following questions:

- How can you minimize delivery costs?
- What approaches or support may work best for participants with lower literacy or education levels?
- How should facilitators handle contentious topics to ensure the content and delivery are compatible with cultural norms?
- What activities can you incorporate or adapt to reinforce the participants’ persistence, self-esteem, and confidence?
- How should you organize the program schedule and logistics to accommodate household obligations and caregiving responsibilities?
- What extra security precautions do facilitators need to provide to ensure participants’ safety?

Designing Learning Experiences starts with a clear understanding of the business measures and desired performance outcomes. The needs assessment provides this information. All content and activities in the learning experience should align directly with achieving these outcomes and measures.

If you cannot confirm that a learning solution will help close identified performance gaps, you are obliged as a training professional to advise the client that an investment in a learning solution might not pay off.

Because the desired performance outcomes should influence the design, you need an understanding of the competencies for Assessing Performance Needs in order to be an effective instructional designer. Because the design of classroom and virtual classroom learning experiences will be delivered by facilitators, you should also have an understanding of the competencies for Facilitating Learning.

The outputs for the *Designing Learning Experiences* competency are the instructional materials for learning experiences. This can include facilitator guides, participant guides, presentation slides,

reference material, job aids, e-learning, self-study materials, tools, posters, or other learning material. The Design Document, which is the output from the *Designing Curricula* competency, provides the outline. In this competency the instructional designer provides the specific details to turn the outline into a tangible and usable product.

Many organizations, including IFC, require detailed outlines for both online and instructor-led learning experiences to identify the learning objectives, topics, content selection and sequencing, suggested instructional approach, learning activities, resources, and time estimates for each topic.

In this competency category, we use the word “storyboard” in an e-learning context to represent the document that presents all the learning content in sequence, including mock-ups of each screen, narration, instructions for visuals, and

programming instructions that tell developers how to program all buttons on the screen and respond to any input participants might enter.

We have listed the design competencies in a linear order, but effective learning experiences are most often the result of an iterative process involving successive prototypes that approximate the ultimate solution. This process includes iterative design (design analysis, learning objectives, and detailed design) and iterative development (development and validation of materials and support for implementation).

For additional information on *Designing Learning Experiences* when conducting training in fragile and conflict-affected situations and gender-inclusive training, please refer to the FCS and gender supplements at the end of this guide.

DESIGNING LEARNING EXPERIENCES

COMPETENCIES AND SUPPORTING COMPETENCIES | This section contains information about the importance of mastering the competencies, tasks for each supporting competency, key outputs, and assessment criteria.

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1. Conduct design analysis



Importance

The impact of mastering these competencies is that you:

- Create learning solutions that address performance gaps.
- Design the learning based on desired performance outcomes.
- Design a learning experience suited to the participants and their work and regional environment.
- Have a realistic, manageable plan for the development of the learning experience.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

1a	Confirm that the learning solution will address the identified performance gap(s)
<input type="checkbox"/>	Align content with identified performance gaps
<input type="checkbox"/>	Review job, competency, or goal analysis, if available, to clarify desired performance
<input type="checkbox"/>	Confirm that learning and related transfer activities address performance gap(s)
<input type="checkbox"/>	Confirm priority competencies or tasks required to close performance gaps
<input type="checkbox"/>	Confirm whether the program is mandatory for all participants
<input type="checkbox"/>	Confirm and identify the target audience for the program
1b	Determine context requirements for learning solutions
<input type="checkbox"/>	Gather information about participants (for example, their perspective, education, technological literacy)  
<input type="checkbox"/>	Identify design constraints (for example, scheduling, location of participants, components of corporate culture, brand standards, style guidelines, cost, equipment)
<input type="checkbox"/>	Identify accessibility requirements (for example, accessibility for e-learning, classroom, websites, job aids)
<input type="checkbox"/>	Identify technical constraints (for example, preferred software or authoring tools, network limitations)
<input type="checkbox"/>	Consider how current and future availability of technology might affect the design (for example, reporting and tracking capabilities, social media)
<input type="checkbox"/>	Advise how technology and tools can support the learning experience (see <i>Designing Curricula 2e</i>)

1c Research subject matter

- ▶ Identify potential sources of subject matter expertise (for example, subject matter experts, job documentation, learning materials, books, websites, social media, research reports)
- ▶ Review existing job-related subject matter resources and learning materials
- ▶ Interview subject matter experts to gather initial information

1d Conduct task analysis

- ▶ Work with subject matter experts to:
 - ▶ Determine whether each task is a procedure, process, set of principles, or a combination
 - ▶ Break tasks into component parts
 - ▶ Identify relationships among tasks and sub-tasks
 - ▶ Identify all skills and knowledge required for successfully mastering the task
- ▶ Present results of task analysis in a way that is easy to understand
- ▶ Validate task analysis for accuracy and completeness

1e Plan for designing and developing learning solutions

- ▶ Define project deliverables (for example, pre-work, case handouts, job aids, participant workbook)
- ▶ Determine roles and responsibilities, time, budget, software, and other technology required to design and develop the learning experience
- ▶ Develop an efficient and effective project plan for designing and developing the learning experience
- ▶ Prepare a preliminary plan for validating and maintaining the learning experience
- ▶ Update plans as information and requirements evolve during the design and development process

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Desired performance outcome(s) and performance gap(s)	Analysis acknowledges any assessment of performance needs already conducted
	Gap between current and desired performance outcomes is clear
	Gap is stated in terms of specific performance outcomes
	Analysis confirms that the learning solution and related transfer activities address performance gap(s)
Context requirements for learning	Context requirements are documented, feasible, accurate
	Context requirements include relevant information about the participant, design constraints, and technical constraints
	Impact of context requirements on design is identified
Task analysis	Task analysis is documented and comprehensive
	Task analysis is based on first-hand knowledge of job responsibilities
	Task analysis identifies sub-tasks, skills, and knowledge required to achieve desired performance outcomes
	Task analysis uses active and appropriate verbs
Plan for design and development of learning	Plan includes specifications for deliverables, roles and responsibilities, costs, timing, and software and technology requirements
	Plan identifies detailed review and approval process and responsibilities
	Plan includes initial plans for pilot, translation, printing and distribution, web hosting, and maintenance
	Plan is documented and communicated

2. Establish learning objectives and evaluation

Importance

The impact of mastering these competencies is that you:

- Closely align learning objectives with desired performance outcomes.
- Sequence learning in a way that makes sense.
- Design evaluation of learning objectives before designing the instruction.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

2a Write learning objectives

See *Designing Curricula 3a*

2b Design evaluation of learning objectives

- ▣ Identify appropriate level of evaluation for each learning objective (for example, recall, comprehension, application, analysis, synthesis, evaluation, creation)
- ▣ Identify appropriate type of evaluation for each learning objective (for example, test questions for comprehension, observation of practice or role play for application)
- ▣ Determine how technology can support evaluation of learning (for example, online testing, performance tracking, automated reporting)
- ▣ Determine procedures for administering the evaluation
 - If using high-tech methods, identify costs for purchasing evaluation equipment and data collection services (for example, data usage on cellphones)

2c Develop materials to evaluate learning objectives

- ▣ Prepare assessment forms, checklists, and scoring guidelines to evaluate tasks and skills (for example, checklists for observation of practice or role play for application, case study for analysis)
- ▣ Write test questions and scoring guidelines to evaluate knowledge
 - Determine the number of questions needed to evaluate each learning objective
 - Draft test questions with one definitive correct response and plausible incorrect responses
- ▣ Test online evaluations to confirm that they are usable and accurately track and report data

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Learning objectives	Learning objectives are documented and validated
	Learning objectives for each lesson or task align with the goals for the learning experience
	Appropriate level of learning (for example, recall, comprehension, application, analysis, synthesis, evaluation) is clear for each learning objective
	Learning objectives include observable outcome, condition, and standard for each objective at an application, analysis, evaluation or creation level
	Learning objectives are sequenced for ease of learning
	Learning objectives are aligned with desired performance outcomes
Design for evaluation of learning objectives	Evaluation method is appropriate to level of learning objectives
	Evaluation method provides an observable, measurable outcome for each learning objective
	Evaluation method indicates the conditions under which the assessment occurs
	Evaluation method identifies assessment and administration procedures (for example, scoring, opportunity to retest or re-examine)
	Evaluation method is consistent with context requirements for learning experience
Materials to evaluate learning objectives	Materials to evaluate learning are appropriate to level of learning objectives
	Materials to evaluate learning enable observation of achievement of learning objectives

3. Create detailed design

Importance

The impact of mastering these competencies is that you:

- Select the delivery channel(s) that best support the learning objectives.
- Design learning activities that engage participants and support the achievement of learning objectives.
- Receive approval on the overall design before spending time on developing materials.
- Receive feedback while changes are relatively easy to make.
- Identify potential technology issues.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:








3a **Prototype designs to get input from stakeholders**

See *Designing Curricula 4a*





3b **Determine delivery channel(s)**

See *Designing Curricula 3c*

3c **Create detailed outline for learning experience**

- Determine whether to use existing learning materials, in part or whole, to achieve learning objectives
- Determine a general strategy for teaching content (for example, demonstration, discovery learning)
- Co-design learning experience with client, as appropriate
- Create learning activities to provide key knowledge and skill (for example, demonstration, application activity)
- Arrange for extra security precautions for facilitators and participants to take prior to program delivery 
- Embed flexibility in the learning experience design 
- Incorporate confidence-building activities and activities to reinforce participants' self-esteem and persistence  
- Incorporate leadership-building activities 
- Find ways to recognize participants' achievements 
- Replace standard measurement descriptions with daily objects of representative size for low-literacy audiences (for example, "two fist-widths apart" instead of "six inches or 15 centimeters apart")
- Keep examples and activities within the scope of the participants' ability to imagine
- Plan to include women role models as guest speakers 
- Estimate length of time for units and learning activities
- Negotiate additional requirements to support learning activities with client(s), sponsor(s) or both
- Determine requirements for audiovisual materials
- Confirm that the learning experience meets accessibility requirements

3d Design support for the transfer of learning and sustained performance

- ▶ Design any pre-program supports:  
 - ▶ Identify remedial training or assistance if education levels need bolstering
 - ▶ Design optional pre-program courses to bring participants' baseline skills up to acceptable levels for the program
- ▶ Design initiatives to support transfer of learning:
 - ▶ Create opportunities for participants to practice applying new knowledge and skills
 - ▶ Create reminder notices to reinforce key learning points
 - ▶ Create notices with tips for improving efficiency or customizing skills for specific situations
 - ▶ Create opportunities for participants to receive feedback or assistance on application of new skills
 - ▶ Incorporate coaching and mentoring follow-up into the program design as feasible 
- ▶ Incorporate social networks and peer-to-peer learning 
 - ▶ Provide facilitation plans in peer-to-peer learning
- ▶ Leverage technology to support transfer of learning (for example, automated reminders, performance tracking, performance support, social media use)
- ▶ Estimate timing and work effort to support transfer of learning
 - ▶ Develop an economically feasible approach to post-program support
 - ▶ Develop a plan to support providers with business continuity
 - ▶ Identify the costs for providing post-program support
 - ▶ Determine who pays the costs of providing post-program support
- ▶ Design or advise the design of performance support systems and materials (for example, repositories for videos and job aids)
- ▶ Design or advise the design of social media to support transfer of learning (for example, blogs, wikis, discussion forums)
- ▶ Design or advise the design of incentives to support transfer of learning (for example, badges, leader boards, bonuses)

3e Prototype learning materials

- ▶ Incorporate design requirements (for example, corporate branding, templates, guidelines)
 - For low-literacy audiences, use videos more than text-based methodologies and incorporate more graphics than text into participant materials
- ▶ Produce prototypes of learning materials (for example, participant workbook, facilitator guide, slides)
- ▶ Produce prototypes of workbook page types (for example, content, instructions, reflection notes)
- ▶ Test technology and other logistics
- ▶ Confirm that learning materials meet accessibility requirements

3f Prototype digital interface

- ▶ Produce prototypes of interface design, including titles, menus, and all navigation elements
- ▶ Produce prototypes of screen types (for example, text and graphic, multiple choice, drag and drop)
- ▶ Test technology and other logistics
- ▶ Confirm that the interface meets accessibility requirements

3g Conduct design walkthrough

- ▶ Conduct walkthrough of detailed outline for the learning experience and prototypes with key stakeholders
- ▶ Secure approval of detailed outline for the learning experience and prototypes

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Detailed outline for learning experience	Document includes organization need, performance gaps, desired performance outcomes, delivery channel(s), learning objectives, learning strategy, and content and learning activities with estimated duration
	Design supports the learning strategy and achievement and evaluation of learning objectives and is consistent with regional or cultural norms
	Design includes learning activities that engage participants in culturally appropriate ways
	Delivery channel(s) meet(s) criteria identified
	All design choices are based on performance outcomes, learning objectives, resources available, and accepted best practices in performance and learning
Design for supporting the transfer of learning	Design includes realistic activities and tools to support the transfer of learning to the workplace, based on the desired performance outcomes and availability of support in the region
	Design includes estimated time and work effort required for participants and coaches/mentors
	Design uses available technology appropriately
Prototype of digital interface	Prototype includes titles, menus, and navigation elements
	Prototype provides samples and templates of expected page types
	Prototype complies with corporate branding, templates, and guidelines
	Production quality is appropriate to budget
	Technology and other logistics work; back-up strategies are provided in case of failure

4. Develop materials


Importance

The impact of mastering these competencies is that you:

- Develop learning materials that enhance the effectiveness of the learning experience and support learning objectives.
- Support consistent delivery across multiple facilitators.
- Support transfer of learning to the workplace.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

4a	Write or compile content for participant and instructor materials
<input type="checkbox"/>	Follow instructional writing principles and organization guidelines
<input type="checkbox"/>	Work within existing templates
<input type="checkbox"/>	Write job aids and other participant materials
<input type="checkbox"/>	Write text for slides, videos, and websites
<input type="checkbox"/>	Write case studies and role plays
<input type="checkbox"/>	Write scripts for audio and video
<input type="checkbox"/>	Write facilitator guides
<input type="checkbox"/>	Develop content with language, examples, and images aligned with social and cultural norms  
4b	Develop layout and visuals for participant and instructor materials
<input type="checkbox"/>	Develop or advise on visuals that are culturally appropriate to communicate content (for example, pie charts, histograms, photography or illustrations, flow charts)
<input type="checkbox"/>	Develop layouts based on type of content (for example, concept, procedure, principles)
<input type="checkbox"/>	Follow visual design principles
<input type="checkbox"/>	Source graphics from within or outside the organization
<input type="checkbox"/>	Comply with corporate branding templates and style guidelines
<input type="checkbox"/>	Comply with copyright requirements
4c	Develop storyboards
<input type="checkbox"/>	Capture all information, including text, images, interactivity, answer prompts, and activities
<input type="checkbox"/>	Capture all programming and production instructions
<input type="checkbox"/>	Comply with privacy, information security, and copyright requirements

1. Conduct design analysis

2. Establish learning objectives and evaluation

3. Create detailed design


4. Develop materials

5. Support implementation

4d Manage review and revision cycles with stakeholders, including subject matter experts

- ▶ Develop templates to facilitate input from subject matter experts
- ▶ Prepare for meetings with stakeholders and subject matter experts
- ▶ Compile input and facilitate reviews with multiple stakeholders and subject matter experts
- ▶ Review training content and design for contentious issues
- ▶ Check that learning experience complies with program guidelines regarding topics or images to avoid
- ▶ Get a legal review of course material, if necessary, to confirm it does not violate local laws or put the sponsoring organization in legal liability
- ▶ Support the resolution of differences in information and opinions
- ▶ Get signed approval for course from subject matter expert or designated client approver

4e Produce web-based learning

- ▶ Produce or manage production of audio recording
- ▶ Produce or manage production of video
- ▶ Produce or manage production of online programs
- ▶ Produce or manage production of websites, apps, and other digital content or tools
- ▶ Prototype materials for input and approval prior to full production
- ▶ Manage production in multiple languages
- ▶ Curate external materials for learning (for example, videos, blogs, online courses)
- ▶ Designing digitally-based learning experiences that are appropriate for participants 

4f Develop materials to support the transfer of learning and sustained performance

- ▶ Develop performance support tools (for example, job aids, automated reminders)
- ▶ Develop guidance and tracking (for example, self-assessments, learning progression maps)
- ▶ Develop coaching materials for managers and other coaches to support participants (for example, observation checklists, validation cases, roleplays)

4g Develop materials to evaluate participants' reaction

- ▶ Use available technology to support evaluation of participants' reaction to the learning experience
- ▶ Develop materials to assess reaction (for example, feedback forms, online surveys)

4h Develop materials to evaluate the transfer of learning

- ▶ Determine the feasibility of using technology to support evaluation of transfer of learning, including who will pay the costs for purchasing evaluation equipment and data collection services, such as data usage on cell phones
- ▶ Develop materials to assess transfer of learning (for example, observation checklists)

4i Validate learning design and materials

See *Designing Curricula 3c* and the following

- ▶ Conduct validation and make agreed-upon changes
- ▶ Obtain final approval of design and materials

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Participant materials	Participant materials conform to plan for designing and developing learning experience
	Participant materials support learning objectives
	Participant materials follow graphic design and instructional writing principles
	Participant materials are appropriate to the participant's work and regional environment
	Participant materials are accessible
Facilitator materials	Facilitator materials conform to plan for designing and developing learning experience
	Facilitator materials indicate how to support achievement of learning objectives
	Facilitator materials include how to evaluate learning objectives
	Facilitator materials follow graphic design and instructional writing principles
	Facilitator materials provide enough guidance so others who did not design the program can read the material and deliver the course in a consistent manner
	Facilitator materials are organized logically
Storyboards	Storyboards support achievement and evaluation of learning objectives
	Storyboards include all content, text, images, activities, and interactivity
	Storyboards include programming and production instructions
Management of revision and review cycles	Review cycles are planned and realistic
	Subject matter experts and stakeholders feel respected and included
	Signed approval is obtained at key stages of the design and development process
Web-based learning (for example, apps, videos, e-learning)	Learning experience conforms to detailed outline
	Learning materials follow graphic design and instructional writing principles
	Learning experience and materials are accessible
	Learning experience is written at the appropriate reading level

KEY OUTPUTS	ASSESSMENT CRITERIA
Materials to support transfer of learning	Materials support transfer of learning
	Materials clearly identify roles and responsibilities of participant and others (for example, coaches, mentors, supervisors, and peers)
	Materials can be used in the workplace without assistance
Materials to evaluate participant reaction	Evaluation is clear and easy to complete
	Evaluation captures relevant data (for example, confidence in applying new skills on the job, effectiveness of instructional methods and materials)
	Evaluation uses available technology to simplify data collection and reporting
Materials to evaluate transfer of learning	Evaluation is clear and easy to complete
	Evaluation captures relevant data (for example, uptake of new skills, proficiency in applying new skills, and barriers to transfer of learning to the workplace)
	Evaluation uses available technology to simplify data collection and reporting

5. Support implementation






Importance

The impact of mastering these competencies is that you:

- Support internal or external marketing of the learning experience.
- Confirm that materials are in place for the learning experience.
- Help facilitators and administrators prepare for the learning experience.
- Help facilitators and coaches prepare to support transfer of learning to the workplace.
- Establish a realistic and manageable plan for keeping the learning experience up to date.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

5a	Manage publication and distribution of materials
<input type="checkbox"/>	Monitor completion of translation, publication, distribution or uploading, and storage of all materials
<input type="checkbox"/>	Confirm that final materials meet quality requirements
5b	Prepare for implementation
<input type="checkbox"/>	Implement or update learning management system with program information and materials
<input type="checkbox"/>	Write a clear, concise course or program description for communications purposes <ul style="list-style-type: none"> ▸ Use appropriate channels and language to raise awareness about the program 
<input type="checkbox"/>	Create database to track scheduling requirements <ul style="list-style-type: none"> ▸ Secure resources to provide and track administrative requests and technical support, as required
<input type="checkbox"/>	Identify program locations and times that are safe, convenient, and easy to access for all participants and facilitators  
<input type="checkbox"/>	Select learning environment (on-site or virtual) that accommodates participants with disabilities
<input type="checkbox"/>	Determine emergency updates to convey to facilitators and participants on a regular basis 
<input type="checkbox"/>	Secure resources to provide production assistance for classroom-based or live online learning experiences <ul style="list-style-type: none"> ▸ Identify sufficient, qualified and appropriate facilitators ▸ Decide on the appropriate gender of the facilitator and provide gender awareness training if needed  ▸ Schedule any guest speakers (for example, project sponsor or role models)
<input type="checkbox"/>	Provide food and drinks to participants, if appropriate and acceptable to client
<input type="checkbox"/>	Arrange for class technology (for example, computers, projectors, easels, chart paper, markers) <ul style="list-style-type: none"> ▸ Confirm that any equipment and other resources required are available and functioning ▸ Keep necessary equipment to mitigate the effects of natural environmental challenges (for example, floods, heat, cold) and identify alternative training delivery sources, in case of disruption ▸ Prepare materials to orient participants to any required technology ▸ Print materials for class sessions, as needed

- ▶ Select participants for sessions
- ▶ Schedule facilitators for class sessions
- ▶ Schedule participants in class sessions
- ▶ Advise participants, their supervisors, and coaches of prerequisites and requirements for pre-work and learning
- ▶ Provide access to facilitators and participants for online material or sites

5c Prepare support for transfer of learning and sustained performance

- ▶ Secure people resources to provide support for transfer of learning
 - Plan for coaching and/or mentoring ♀
 - Plan to include women role models ♀
 - Include social networks and peer learning ♀
- ▶ Secure technology required to support transfer of learning (for example, online performance tracking tools, social media platforms)
- ▶ Prepare people resources to support activities for transfer of learning
- ▶ Follow up on transfer activities

5d Plan for maintenance

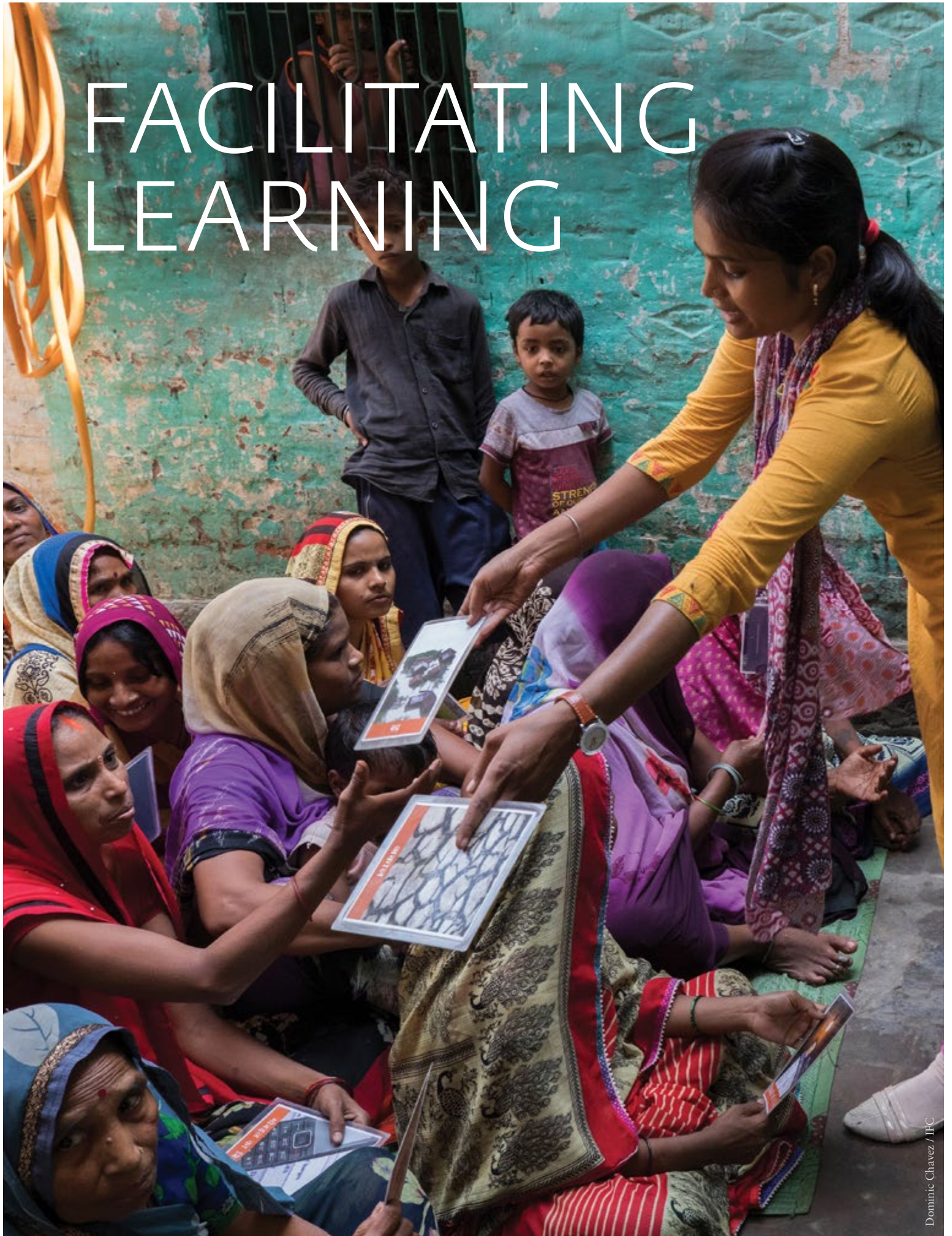
- ▶ Determine requirements for maintenance of the design and learning materials
- ▶ Determine guidelines for deciding whether to make revisions (for example, number of calls for technical support, significant changes to desired performance outcomes)
- ▶ Develop plan and budget for maintenance

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Train the trainer/ facilitator session	Facilitators can explain how the design supports learning objectives, desired performance outcomes, and business measures
	Facilitators can demonstrate that they are prepared to deliver learning experience
	Facilitators refer to safety and gender-inclusive guidelines, as required
Administrative and technical support	Administrative and technical support includes plans for tracking questions, comments, and issues and implementing changes, based on feedback
	Administrative and technical support staff can explain their role in supporting the achievement of desired performance outcomes
	Administrative and technical support can answer anticipated questions about the content or technology
	Facilitators and participants have access to any needed online materials or sites
Briefing for coaches and mentors	Coaches and mentors can explain their role in supporting transfer of learning
	Coaches and mentors can explain the participant's role in supporting transfer of learning
	Coaches and mentors state that they are prepared to support transfer of learning
Maintenance plan	Maintenance plan includes roles and responsibilities, process for assessing and handling major revisions and minor modifications, frequency of maintenance cycles, turnaround for changes and corrections, and budget requirements
	Maintenance plan validated with appropriate stakeholders and sponsor

FACILITATING LEARNING



INTRODUCTION

Facilitating Learning can range in scope from coaching a small group gathered around equipment to teaching a few people in a meeting room, leading a webinar with hundreds, even thousands, of participants, and instructing a group of learners outdoors.

Many people begin their work as performance and learning professionals by *Facilitating Learning*. Facilitators often deliver learning experiences that someone else designed and developed. Therefore, to be an effective facilitator, you need to consider how the original content should be adapted for your specific audience.

If you are asked to facilitate learning that is not well designed, it is important to suggest to your client how you could improve it to better achieve desired performance results.

Competent facilitation of learning increases the likelihood that you:

- Create an environment that is conducive to learning.
- Provide an engaging learning experience for your participants.
- Keep participants on task and accountable for their learning.
- Optimize opportunities for participants to interact and practice.
- Tailor learning experiences to the specific needs of individuals and groups.
- Help participants efficiently achieve the set learning objectives.

When *Facilitating Learning* in emerging markets, culture, infrastructure, safety, and personal circumstances can challenge the effectiveness of the session. When you address these challenges directly, participants tend to engage more in class and accept, understand, remember, and use the content better after the class. As you prepare to facilitate, ask yourself the following questions:

- In what language do the participants need to hear the content? Is a translator needed?
- How will you incorporate local societal, religious, political, or legal realities and gender norms into what you say and how will you involve the participants?
- What mitigating steps will you take in the event of an unplanned interruption to class proceedings due to unreliable electricity or internet connectivity, equipment malfunction, or riot?
- What allowances may be required to accommodate:
 - low literacy/numeracy levels
 - translations
 - individual support
 - family caregiving requirements

The supporting competencies outlined here apply to *Facilitating Learning*. Not all may apply to other types of facilitation, for example, conducting strategic planning sessions, team-building sessions, mediation, and conflict resolution or helping groups solve real-world problems.

Because program participants are most often drawn from the organization of your client or program sponsor, “Demonstrate awareness of client organization,” one of the sub-competencies in the *Partnering with Clients* category, is important in *Facilitating Learning*.

For additional information on *Facilitating Learning* when conducting training in fragile and conflict-affected situations and gender-inclusive training, please refer to the FCS and gender supplements at the end of this guide.

FACILITATING LEARNING

COMPETENCIES AND SUPPORTING COMPETENCIES | This section contains information about the importance of mastering the competencies, tasks for each supporting competency, key outputs, and assessment criteria.

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1. Prepare to facilitate


Importance

The impact of mastering these competencies is that you:

- Deliver a learning experience that supports desired performance outcomes and business measures.
- Deliver the learning experience based on a clear understanding of desired job performance.
- Are prepared and knowledgeable.
- Confirm that logistics are in place effectively for facilitation.






Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

1a	Prepare to deliver the content and activities based on the design
▶	Review design and materials for flow, clarity, and timing
▶	Prepare to address specific psycho-emotional needs of the target audience and organization 
▶	Incorporate feedback from previous deliveries to improve content and design
▶	Coordinate roles and responsibilities when working with co-facilitator(s)
▶	Develop subject matter expertise, where required, to facilitate effectively
▶	Access additional subject matter experts, as required, to support facilitation
▶	Rehearse challenging components of the design (for example, explanations of concepts and activities)
▶	Prepare to use classroom media and live online technology
▶	Adapt classroom activities as needed for live online delivery
▶	Prepare training-of-facilitator sessions, if multiple facilitators will lead the course
1b	Check that the learning experience supports desired performance outcomes
▶	Confirm that learning objectives support desired performance outcomes and business measures
▶	Confirm that each learning objective is supported by relevant content and practice activities
▶	Clarify the purpose and expected outcomes of each learning activity
▶	Adapt learning activities to the needs of the specific participant group
▶	Incorporate relevant job-related references, anecdotes, and examples
▶	Confirm any changes with instructional designer to ensure integrity of the design
▶	Ascertain appropriate attire for this training venue
▶	Provide training in languages that participants understand and that are most appropriate for this context

1C Coordinate logistics

See *Designing Learning Experiences 5b* and the following

- ▶ Confirm funding for the operation of the program 
- ▶ Check that participants, their supervisors, and coaches are informed of prerequisites and requirements for pre-work
- ▶ Verify that logistics (on-site or virtual) have been arranged as required (for example, internet access, materials, support resources, webcast producer)
- ▶ Clarify instructions for setting up and closing the classroom, labs, or virtual classroom
- ▶ Verify that the learning environment (on-site or virtual) accommodates participants with disabilities
- ▶ Prepare a back-up plan for technical and logistic failures 
- ▶ Check on materials to orient participants to any required technology
- ▶ Check on catering logistics
- ▶ Maintain the safety and security of facilitators and participants as they come to, attend, and leave the program  
- ▶ Practice preventative security measures 

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Recommendation for modifications to learning experience design and materials	Client and instructional designer are advised of modifications to the design or materials and the reasons for the changes
	Modifications reflect feedback from prior deliveries
	Modifications adapt materials and delivery for the specific participant group
	Modifications adapt materials and delivery for virtual classroom
	Modifications are confirmed with instructional designer
Administrative arrangements	Appropriate facilities and resources are booked and organized
	Participants and supervisors are notified of administrative arrangements
	Instructions for setting up and closing classroom and labs are documented
	Participants' materials are prepared
Contingency plans	Contingency plan is in place to handle any changes from the original design assumptions

2. Create the learning environment



Importance

The impact of mastering these competencies is that you:

- Create a positive, comfortable, learner-centered environment.
- Share responsibility with participants for the success of the learning experience.
- Minimize the negative impact of disruptive behavior.

Supporting competencies and tasks


These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

2a	Establish the physical or live online learning environment
<input type="checkbox"/>	Confirm all logistics prior to start of facilitation (for example, technology and software working as expected, materials and refreshments delivered, accessibility requirements met)
<input type="checkbox"/>	Confirm that the learning environment will promote learning (for example, arranging seats to have good lines of sight, visual aids, space free of distractions)
<input type="checkbox"/>	Create a gender-inclusive learning environment 
<input type="checkbox"/>	Adjust the environment to accommodate needs of the participants (for example, temperature, layout, access)
<input type="checkbox"/>	Launch the live online platform and confirm operation of functions needed
<input type="checkbox"/>	Provide safety and security training relevant for the program as part of the introductions to the program
<input type="checkbox"/>	Update security arrangements continuously for facilitator and participants
2b	Address the social and emotional needs of participants
<input type="checkbox"/>	Welcome participants as they enter the physical or live online learning environment
<input type="checkbox"/>	Encourage introductions among participants
<input type="checkbox"/>	Conduct opening activity to address participants' sense of belonging and emotional safety in the class
<input type="checkbox"/>	Orient participants to the classroom or the live online platform
<input type="checkbox"/>	Monitor energy or "willingness to learn" level and adapt facilitation as needed
<input type="checkbox"/>	Acknowledge each participant, both verbally and non-verbally
<input type="checkbox"/>	Support participants' psycho-emotional needs during the program 
2c	Establish responsibilities for the success of the learning experience
<input type="checkbox"/>	Relate learning objectives to desired performance outcomes and business results
<input type="checkbox"/>	Clarify expectations, roles, and responsibilities for participants and facilitator(s)
<input type="checkbox"/>	Establish ground rules for individual and group behavior
<input type="checkbox"/>	Provide options for adjusting sequence, activities, and content as appropriate
<input type="checkbox"/>	Encourage active participation during class

2d Model appropriate behavior

- ▶ Maintain warm and respectful behavior (for example, open, positive body language, smile)
- ▶ Dress to comply with dress code or unwritten norms about dress
- ▶ Use language, references, and comments appropriate to the organization and learners
- ▶ Maintain confidentiality and privacy
- ▶ Address illegal, immoral, or unethical behaviors by participants

2e Manage disruptive or counterproductive behavior

- ▶ Respond appropriately when participant behavior is likely to interfere with learning 
- ▶ Manage biases around control or personal preferences
- ▶ Encourage other participants to contribute to managing disruptive or counterproductive behavior
- ▶ Demonstrate respect for each individual when responding to disruptive behavior

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Learning environment (classroom or virtual)	Learning environment is arranged according to specifications in facilitator materials
	Learning environment is available prior to start of facilitation
	All required training technologies are available and functioning
Formal welcome to learning	Welcome is appropriate to participants and content of learning experience
	Welcome encourages participant interaction
	Learning objectives are presented and clarified
	Welcome clearly identifies responsibilities for learning
	Ground rules established and agreed to by the group
	Welcome includes administrative information
Management of disruptive or counterproductive behavior	Response is fair and respectful
	Response aligns with the sponsor's or client's policies
	Response is appropriate and timely
	Response is effective in reducing or eliminating disruptive or counterproductive behavior

3. Engage participants



Importance

The impact of mastering these competencies is that you:

- Gain and keep participant interest and motivation.
- Demonstrate that you value participants' knowledge and experience.
- Use technology to enhance the learning experience.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

3a	Deliver content and instructions
<input type="checkbox"/>	Use a variety of instructional techniques to provide content (for example, demonstration, group discussion, small group activities)
<input type="checkbox"/>	Maintain appropriate balance between providing content and allowing participants to learn on their own
<input type="checkbox"/>	Use appropriate language, anecdotes, analogies, and examples to facilitate learning 
<input type="checkbox"/>	Preempt any volatile issues during training delivery 
<input type="checkbox"/>	Minimize use of jargon
<input type="checkbox"/>	Maintain an appropriate level of energy and enthusiasm
<input type="checkbox"/>	Pace learning to meet the needs of the group
<input type="checkbox"/>	Use bridges and transitions to orient participants and maintain continuity among concepts and sections
<input type="checkbox"/>	Confirm that instructions for activities are understood by participants
<input type="checkbox"/>	Provide summaries and opportunities to review at appropriate intervals
3b	Lead group discussions
<input type="checkbox"/>	Ask questions to facilitate discussions and check understanding
<input type="checkbox"/>	Draw upon participant experience, knowledge, and skill to enhance learning
<input type="checkbox"/>	Use gestures, body movements, and pauses to encourage participation
<input type="checkbox"/>	Use silence effectively to encourage participants to reflect and respond
<input type="checkbox"/>	Encourage participation from all participants
<input type="checkbox"/>	Ensure that individual participants do not dominate discussions
<input type="checkbox"/>	Respond to verbal and non-verbal cues from participants

3c Respond to participant questions and comments

- ▶ Encourage questions and comments from participants
- ▶ Paraphrase participant questions and comments to ensure clarity and understanding before responding
- ▶ Determine when to answer yourself, when to involve the group, and when to defer a question
- ▶ Verify that the question was answered or addressed before continuing
- ▶ Acknowledge participant contributions by providing both evaluative and non-evaluative feedback
- ▶ Adapt content or delivery in response to participant questions and comments
- ▶ Refer back to participant questions and comments, as appropriate

3d Use differences and controversy to enhance learning

- ▶ Encourage openness to differing points of view
- ▶ Assist participants in understanding and reconciling differing points of view
- ▶ Model conflict resolution techniques
- ▶ Maintain composure and respect for individuals and the group

3e Optimize the use of visual aids and equipment

- ▶ Position yourself, equipment, and visual aids to enhance learning and reduce distraction
- ▶ Use media to enhance learning, not as a crutch
- ▶ Troubleshoot equipment problems and implement backup plan as needed

3f Use live online tools

- ▶ Maintain technical skills required to use live online tools (for example, chat, whiteboards, breakouts)
- ▶ Optimize use of live online tools to solicit input, enhance learning, and encourage collaboration
- ▶ Troubleshoot technical problems and implement backup plan as needed

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Delivery of content	Content is delivered as designed, using appropriate methods and activities
	Delivery of content does not reduce time designed for practice
	Language, including examples, is clear and appropriate for participants
	Bridges and transitions are clear and link sections appropriately
	Non-verbal communication supports participant interaction
Group discussions	Discussions engage participants by asking open questions
	Discussions draw on participants' experience to reinforce learning
	Discussions encourage participation from all participants
Participant questions and comments	Questions are encouraged in order to enhance the learning of individuals and the group
	Questions are acknowledged and paraphrased to ensure understanding
	Questions are answered or deferred, as appropriate
	Facilitator verifies that a response addresses the participant's question
Differences and controversy	Differences are handled in a manner sensitive to cultural norms and with composure and respect for individuals and the group
	As appropriate, open expression of differences is encouraged in order to enhance the learning of individuals and the group
Visual aids, equipment, and online tools	Visual aids, equipment, and tools are used effectively to support achievement of learning objectives, in accordance with design and operating instructions

4. Foster learning




Importance

The impact of mastering these competencies is that you:

- Establish and retain credibility with participants.
- Support participants in meeting the learning objectives.
- Help participants interact and support one another.
- Support the transfer of learning to the workplace.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

4a	Demonstrate appropriate expertise
<input type="checkbox"/>	Establish credibility by providing your credentials, including related experience
<input type="checkbox"/>	Demonstrate understanding of the organization and relevant job performance
<input type="checkbox"/>	Present information and concepts clearly
<input type="checkbox"/>	Use relevant facts, examples, or analogies to respond to questions or illustrate concepts, and make sure that they are appropriately sensitive to local gender norms and political and religious sensitivities  
<input type="checkbox"/>	Partner with subject matter experts
<input type="checkbox"/>	Refer participants to resources for content beyond the scope of the learning experience
<input type="checkbox"/>	Communicate using language that is appropriate to the participants' educational levels and pre-existing knowledge of the subject
4b	Facilitate individual and group activities
<input type="checkbox"/>	Provide opportunities for participants to actively engage with the content
<input type="checkbox"/>	Set clear expectations for outcomes of activities and link to learning objectives
<input type="checkbox"/>	Give clear instructions for activities
<input type="checkbox"/>	Monitor progress, providing clarification and coaching as needed
<input type="checkbox"/>	Create a supportive environment for participants to provide feedback to each other
<input type="checkbox"/>	Provide opportunities to present and share individual and group work
<input type="checkbox"/>	Foster development of self-confidence and leadership skills into learning as needed 
<input type="checkbox"/>	Include peer-to-peer learning 
<input type="checkbox"/>	Debrief activities to reinforce learning
<input type="checkbox"/>	Be patient and allow plenty of time for participants to practice during the program 

4C Facilitate to support the transfer of learning and sustained performance

- ▶ Provide job-related and organization-related examples while facilitating
- ▶ Link learning content and activities to job and organization requirements
- ▶ Provide opportunities to use job aids and other relevant transfer materials while facilitating
- ▶ Introduce transfer activities and their importance while facilitating
- ▶ Follow up on transfer activities (for example, action plans, peer coaching), as appropriate

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Facilitator credibility	Facilitator demonstrates understanding of content, organization, and participants' roles
	Participants acknowledge facilitator's qualifications and credibility
Activities and practice	Instructions for activities and practice are clearly presented
	Activities and practice are linked to learning objectives
	Participants discuss the results of their activities to reinforce learning
Positioning of transfer activities	Learning content, examples, and activities linked to job and organization requirements
	Importance of transfer activities is positioned while facilitating
	Job aids and other relevant resources are incorporated into learning

5. Assess learning

Importance

The impact of mastering these competencies is that you:

- Support participants in their efforts to achieve the learning objectives.
- Provide feedback and coaching to help participants improve their performance.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

5a	Confirm that participants have prerequisite skills and knowledge
▶	Assess whether participants have prerequisite skills and knowledge (for example, administering pre-tests, checking human resources records, completion of prerequisites)
▶	Address gaps in prerequisite skills and knowledge (for example, ask participants to re-enroll when ready, provide participants with additional resources, refer participants to additional learning)
5b	Assess individual achievement of learning objectives
▶	Conduct formal or informal assessments as designed to assess performance on each learning objective (for example, test questions for comprehension, observation of practice or role play for application)
▶	Evaluate achievement of each learning objective before moving to the next learning objective
▶	Provide post-assessment feedback and coaching
▶	Provide additional opportunities for learning and practice, as required

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Qualified class list	Individual participants meet entry criteria for learning
	Individual participants have completed prerequisite learning
Assessment of individual learner performance	Individual participant performance is assessed against each learning objective
	Individual participant performance is assessed, as designed
Feedback and coaching on performance provided to participants	Feedback is specific, balanced, constructive, confidential, and respectful
	Feedback is related to learning objectives
	Coaching provides corrective action where required

A young Black woman with short, curly hair and glasses is smiling warmly while looking at a computer monitor. She is wearing a sleeveless top with vertical stripes in red, yellow, blue, and green. The background is a blurred office or classroom environment with other people and computer monitors. The text 'SUPPORTING THE TRANSFER OF LEARNING' is overlaid in white, sans-serif font on the bottom left of the image.

SUPPORTING
THE TRANSFER
OF LEARNING

INTRODUCTION

Supporting the Transfer of Learning involves designing and promoting activities and materials that help participants apply what they have learned on the job or at home. These follow-up interventions occur after the learning experience. Activities may include reminder emails, feedback and coaching by a manager or mentor, job aids, discussion forums, web-based tools, additional opportunities for practice, and recognition for changes in behavior.

Supporting the Transfer of Learning increases the probability that participants will use the knowledge and skills they acquire after they finish the learning experiences.

When designing transfer activities and materials, it is important to consider all the factors that support performance: necessary information, tools, and resources; clear expectations; specific and timely feedback; and recognition and rewards.

Competent support for the transfer of learning increases the likelihood that you:

- Address considerations for transfer during the needs assessment phase.
- Design and develop materials to support the transfer of learning.
- Prepare coaches and mentors to support the transfer of learning.
- Position content and activities during the program to support the transfer of learning.
- Conduct transfer of learning activities.

When *Supporting the Transfer of Learning* in emerging markets, culture, infrastructure, and personal circumstances affect the design and effectiveness of the support. When you address these challenges directly, participants tend to remember and correctly use the content in their

daily lives. As you prepare to support the transfer of knowledge, ask yourself the following questions:

- How will you incorporate local societal, religious, political, or legal realities and gender norms into the support you provide?
- How can you help participants expand their business or personal connections to enhance the overall impact of the program?
- What follow-up training and post-program activities are suitable for participants?
- How can you provide timely support and assistance in a way that is economically feasible for both the participants and the sponsoring organization?
- How can you leverage technology to assist with support?
- What kind of support can you provide that takes into account the logistical, technical, and infrastructure realities of the area where the participants live or work?

Although we discuss support after delivery in this model, do not wait until after training is delivered to think about the transfer of learning. Ask questions about the feasibility and needs related to transfer during the analysis phase. Design tools and support approaches during the Design phases. Familiarize participants with the tools and alert them to any post-program support events during the Facilitation of the program. We have kept transfer as a separate category to highlight its importance and to remind you to address these issues.

Additional information on *Supporting the Transfer of Learning* when conducting training in fragile and conflict-affected situations and gender-inclusive training, please refer to the FCS and gender supplements at the end of this guide.

SUPPORTING THE TRANSFER OF LEARNING

COMPETENCIES AND SUPPORTING COMPETENCIES | This section contains information about the importance of mastering the competencies, tasks for each supporting competency, key outputs, and assessment criteria.

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 - 1b. Design support for the transfer of learning and sustained performance. 97
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 - 2b. Facilitate support for the transfer of learning and sustained performance 99
 - Key outputs and assessment criteria. 99

1. Design the transfer of learning





Importance

The impact of mastering these competencies is that you:

- Design transfer activities that are appropriate for the organization, work unit, participants, and desired performance outcomes.
- Organize locally-appropriate program follow-up.
- Avoid political or social sensitivities in post-training follow-up.
- Identify follow-up training and post-program activities suitable for participants.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

1a	<p>Plan support for the transfer of learning and sustained performance See <i>Assessing Performance Needs 4c</i> and the following:</p> <ul style="list-style-type: none"> ▶ Develop a cost-effective post-program support ▶ Determine participants' access to post-program technical support and preferred method for support  <ul style="list-style-type: none"> ▸ Provide post-program support via distance education ▶ Arrange for safe venues and travel routes for program follow-ups  
1b	<p>Design support for the transfer of learning and sustained performance See <i>Designing Learning Experiences 3d</i></p>
1c	<p>Develop materials to support the transfer of learning and sustained performance See <i>Designing Learning Experiences 4f</i> and the following:</p> <ul style="list-style-type: none"> ▶ Avoid political or social sensitivities in the program follow-ups 

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Plan for supporting the transfer of learning	Plan includes realistic solutions for the transfer of learning, based on desired performance outcomes
	Plan identifies resources and time required to implement support for the transfer of learning
	Plan includes communication and follow-up activities
	Plan identifies technology to support the transfer of learning
	Plan includes estimated time and work effort required for participants and coaches
Design for supporting the transfer of learning	Design includes realistic activities and tools to support the transfer of learning, based on the desired performance outcomes
	Design uses available technology appropriately
Materials to support the transfer of learning	Materials support the transfer of learning
	Materials clearly identify roles and responsibilities of participant and others (for example, mentors, supervisors, peers)
	Materials can be used in the workplace without assistance

2. Implement support for the transfer of learning





Importance

The impact of mastering these competencies is that you:

- Increase the likelihood that participants will transfer learning to the workplace.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

2a	<p>Prepare support for the transfer of learning and sustained performance See <i>Designing Learning Experiences 5c</i> and the following</p> <ul style="list-style-type: none"> ▶ Support participants' psycho-emotional needs after the program and provide confidence building to encourage them to continue using what they learned in class  ▶ Determine available services for coaching, mentoring, peer-to-peer, and business-to-business networking <ul style="list-style-type: none"> ▶ Identify qualifications for serving as a mentor or coach ▶ Prepare coaches and/or mentors to support the transfer of learning  ▶ Create class reunions to encourage participants to stay in contact with each other ▶ Encourage networking and make efforts to increase peer-to-peer or business-to-business networks   ▶ Establish outreach communication channels
2b	<p>Facilitate support for the transfer of learning and sustained performance See <i>Facilitating Learning 4c</i></p>

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Briefing for coaches and mentors	Coaches and mentors can explain their roles in supporting the transfer of learning
	Coaches and mentors can explain the participant's role in supporting the transfer of learning
	Coaches and mentors demonstrate that they are prepared to support the transfer of learning
Positioning transfer activities	Learning content, examples, and activities are linked to job and organization requirements
	Importance of transfer activities is positioned while facilitating
	Job aids and other relevant resources are incorporated into learning

EVALUATING LEARNING



INTRODUCTION

Evaluating Learning can take many forms, including surveys of learner reaction (sometimes called “smile sheets”), knowledge tests, skill demonstrations, comparisons of pre- and post-learning performance, and calculations of return on investment.

The overall purpose of *Evaluating Learning* is to determine the effectiveness of the learning and whether performance and business objectives were met. This is sometimes called “summative” evaluation. In the *Designing Curricula* and *Designing Learning Experiences* categories, we focused on what is sometimes called “formative” evaluation. We’ve called it “validation.”

Evaluating Learning is an ongoing process that starts with *Assessing Performance Needs*, and continues through *Designing Curricula* and *Designing Learning Experiences*, *Facilitating Learning*, and *Supporting the Transfer of Learning*.

A comprehensive evaluation of learning determines whether a learning solution has affected business results. Business results are usually evaluated six to 12 months after implementation of the learning experience.

In order to determine that the learning solution has affected business results, you must first assess the extent to which the learning has had an impact on performance outcomes. Changes in performance outcomes are usually evaluated a few weeks to several months after implementation of the learning experience.

To ensure that participants are adequately prepared to apply their learning outside the class, you must assess whether learners have acquired the requisite skills and knowledge. This should be assessed against specific learning objectives during implementation of the learning experience. To assess the participants’ reactions, you can have them evaluate their reactions during or immediately after implementation of the learning experience.

A commonly used framework for *Evaluating Learning*, developed by Donald Kirkpatrick, outlines four levels of evaluation.

KIRKPATRICK'S FOUR LEVELS OF EVALUATION	EVALUATING LEARNING COMPETENCIES
1. Reaction	1. Evaluate participant reaction
2. Learning	2. Evaluate learning comprehension
3. Behavior	3. Evaluate transfer of learning (application)
4. Results	4. Evaluate business results (impact)

Competent evaluation of learning increases the likelihood you:

- Identify appropriate and realistic measures for each level of evaluation.
- Produce effective learning that is useful for participants and the organizations to which they belong.
- Gain a comprehensive perspective of modifications that can improve future learning experiences.

In emerging markets, culture, infrastructure, safety, and personal circumstances can challenge evaluation efforts. When you address these challenges directly, you tend to get more accurate and insightful data, which helps with continuous improvement efforts for the program and for proving its impact and value.

As you prepare to evaluate, ask yourself the following questions:

- In what language will you receive the most in-depth feedback from participants? Is a translator needed?
- How can you collect and evaluate data in a way that is economically feasible for both the participants and the sponsoring organization?

- What evaluation methods will work best, given the logistical, technical, and infrastructure realities of the area where the participants live or work?
- What digital methods can you use to collect data?
- How will you incorporate local societal, religious, political, or legal realities and gender norms into the methods used to collect data?
- Do your evaluation questions address the family challenges that women face when applying their learning?
- Was the venue conducive to learning? Did it feel safe and secure?
- Were there any disruptive behaviors towards men and/or women participants during the program and how did it affect their attendance, participation or engagement?

For additional information on *Evaluating Learning*, when conducting training in fragile and conflict-affected situations and gender- inclusive training, please refer to the FCS and gender supplements at the end of this guide.

EVALUATING LEARNING

COMPETENCIES AND SUPPORTING COMPETENCIES | This section contains information about the importance of mastering the competencies, tasks for each supporting competency, key outputs, and assessment criteria.

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1. Evaluate participant reactions

Importance





The impact of mastering these competencies is that you:

- Identify opportunities for improving the facilitation and design of the learning experience.





Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:



1a **Develop materials to evaluate participant reactions** See *Designing learning experiences 4g* and the following:

- ▶ Develop material that is gender-inclusive and culturally appropriate  
- ▶ Determine viability of data collection methods including digital  

1b **Assess participant reactions**

- ▶ Collect and aggregate data to assess participant reaction
- ▶ Identify patterns and trends in participant reactions
- ▶ Identify factors other than learning that might affect participant reactions
- ▶ Document learnings related to technology and logistics
 - ▶ Determine how access or lack of access to technology has supported and hindered learning  
- ▶ Evaluate effectiveness of using women role models in registration, attendance, and active engagement in the program, as well as program completion 
- ▶ Document participants' psycho-emotional learning needs 

1c **Recommend changes based on participant reactions**

- ▶ Identify potential changes to design and facilitation, based on assessment of participant reactions
- ▶ Determine the feasibility of identified changes
- ▶ Recommend changes to improve design and facilitation
- ▶ Decide how responses to the program and training should be communicated, taking into account cultural and religious norms, political circumstances, and gender norms and behaviors  

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Materials to evaluate participant reactions	Evaluation method is clear and easy to complete
	Evaluation method captures relevant data (for example, confidence in applying new skills on the job, effectiveness of instructional methods and materials)
	Evaluation method uses technology (where possible) to simplify data collection and reporting
Assessment of aggregate participant reaction	Results identify patterns and trends in participant reactions
	Results should reflect areas for improvement, as well as areas that worked well
	Results should include both quantitative and qualitative results (for example, answers that can be averaged and individual comments)
	Results identify factors that affect participant reactions
Recommended changes to design and facilitation	Recommendations are based on valid and reliable data
	Recommended changes support achievement of learning objectives
	Recommendations are feasible given budget, timing, resource, and other project constraints

2. Evaluate learning objectives

Importance

The impact of mastering these competencies is that you:

- Determine whether participants have achieved the learning objectives, individually and collectively.
- Provide certification of learning, where required.
- Identify opportunities for improving the design and facilitation of the learning experience.

Supporting competencies and tasks






These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

2a Write learning objectives

See *Designing Curricula 3a*

2b Design evaluation of learning objectives

See *Designing learning experiences 2b* and the following:

- ▶ Determine viability of data collection methods including digital  
- ▶ Collect gender-disaggregated data in a gender-inclusive and culturally appropriate manner 
- ▶ If not all data can be collected during the learning experience, arrange for safe venues and transport during post-program data collection  



2c Develop materials to evaluate learning objectives

See *Designing learning experiences 2c*


2d Assess individual achievement of learning objectives

See *Facilitating Learning 5b*

2e Assess aggregate achievement of learning objectives

- ▶ Compile data on individual achievement of learning objectives
- ▶ Analyze aggregate data on achievement of learning objectives
- ▶ Identify patterns and trends in achievement of learning objectives
- ▶ Identify factors that affect achievement of learning objectives  
 - ▶ Evaluate quality of venue and update security information for future programs in the region
 - ▶ Identify any issues of sexual harassment that occurred in your program
 - ▶ Document legal learnings and share lessons learned about addressing legal needs
 - ▶ Evaluate the digital solutions used in the program
 - ▶ Establish baseline economic data and identify macro-economic issues that affected program results

2f Recommend changes based on evaluation of learning objectives

- ▶ Identify potential changes to design and facilitation based on evaluation of learning objectives
- ▶ Determine feasibility of identified changes
- ▶ Recommend changes to improve design and facilitation
- ▶ Plan for implementing changes and for providing updates and refreshers to participants
- ▶ Communicate program results in a gender-inclusive and culturally appropriate manner 

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Evaluation methods for learning objectives	Design of evaluation is appropriate to the levels of learning objectives
	Design of evaluation ensures that the outcome is observable
	Design of evaluation identifies assessment and administration procedures (for example, scoring, opportunity to retry)
	Design of evaluation is consistent with project constraints
Materials to evaluate learning objectives	Materials to evaluate learning are appropriate to the levels of learning objectives
	Materials to evaluate learning enable observation of achievement of learning objectives
Assessment of individual participant performance	Individual participant performance is assessed against each learning objective
	Individual participant performance is assessed as designed
Assessment of aggregate participant performance	Patterns and trends in achievement of learning objectives are identified
	Factors are identified that affect the achievement of learning objectives
Recommended changes to design and facilitation	Recommendations are based on assessment of aggregate data about participant performance
	Recommended changes support the achievement of learning objectives

3. Evaluate the transfer of learning




Importance

The impact of mastering these competencies is that you:

- Determine whether the learning solution affects performance outcomes.
- Identify opportunities for improving the transfer of learning to the workplace.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

3a	Develop a plan to evaluate the transfer of learning <i>See Assessing Performance Needs 4d</i>
3b	Identify desired performance outcomes <i>See Assessing Performance Needs 2c</i>
3c	Develop materials to evaluate the transfer of learning <i>See Designing Learning Experiences 4h</i>
3d	Assess the transfer of learning to the workplace <ul style="list-style-type: none">▶ Gather data to identify gaps between pre-learning, current, and desired performance outcomes▶ Interview former participants to ascertain the application and impact of the training on their work or lives▶ Identify factors other than the learning that might affect performance outcomes▶ Assess the impact of learning on performance outcomes▶ Determine barriers to the transfer of learning (for example, software not working as expected, supervisors not supporting performance)▶ Evaluate how women's family factors impact their ability to transfer the learning ▶ Determine how access or lack of access to technology has supported or hindered the transfer of learning
3e	Recommend changes based on evaluation of the transfer of learning <ul style="list-style-type: none">▶ Identify potential changes to the design and facilitation based on how the learning solution has affected performance outcomes▶ Identify potential changes to support the transfer of learning based on how the learning solution has affected performance outcomes▶ Determine the feasibility of identified changes▶ Recommend changes to improve the impact of the learning solution on performance outcomes▶ Decide how to communicate longer-term program results, taking into account cultural and religious norms, political circumstances, and gender norms and behaviors  

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Plan to evaluate the transfer of learning	Plan identifies what data to gather and analyze
	Plan identifies when to conduct evaluation
	Plan includes benchmarks of pre-intervention performance
	Plan includes an estimate of resources required to implement evaluation plan
Materials to evaluate the transfer of learning	Evaluation is clear and easy to complete
	Evaluation captures relevant data (for example, uptake of new skills, proficiency in applying new skills, and barriers to the transfer of learning to the workplace)
	Evaluation uses technology to simplify data collection and reporting
Assessment of performance results	Gap between pre-intervention, current, and desired performance outcomes is identified
	Results are stated in terms of specific performance outputs
	Results are based on accurate and reliable data and sound analysis
	Cause-effect relationships are determined among performance gaps
	Assessment determines appropriateness of desired performance outcomes in light of actual performance data
Recommended changes to learning solutions and their transfer	Recommendations are based on analysis of how the learning has affected performance
	Recommendations continue to support the achievement of learning objectives
	Recommendations are realistic for the organization and work unit
	Recommendations are based on identified barriers to the transfer of learning
	Recommendations continue to support the achievement of learning objectives
	Recommendations are realistic for the organization and work unit

4. Evaluate business results

Importance

The impact of mastering these competencies is that you:

- Determine whether the learning solution affects business results.
- Identify opportunities for improving the learning and other performance solutions.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:





4a **Develop a plan to evaluate business results for learning solutions**

See *Assessing Performance Needs 4d*

4b **Identify business measures**

See *Assessing Performance Needs 2c*

4c **Assess business results**

- ▶ Gather data to identify gaps between pre-intervention, current, and desired performance outcomes
- ▶ Identify factors other than performance outcomes that might affect business results (for example, political instability and social unrest) 
- ▶ Assess the impact of learning on performance outcomes and subsequent business results
 - ▶ Evaluate improvements in confidence and leadership skills, if applicable 
 - ▶ Evaluate the effectiveness of coaching and mentoring 
 - ▶ Evaluate effectiveness of networking (peer-to-peer or business-to-business) 
- ▶ Collect pre-program and post-program economic data for the target group to determine whether the program had any direct effect on the participants' economic situation
 - ▶ Gather proof of any economic changes that can be directly attributed to the program

4d **Recommend changes based on the evaluation of business results**

- ▶ Identify potential changes to the design and facilitation based on how learning solution and performance outcomes have affected business results
- ▶ Identify potential changes to the support for the transfer of learning based on how learning solution and performance outcomes have affected business results
- ▶ Determine feasibility of identified changes
- ▶ Recommend changes to improve the impact of the learning solution on performance outcomes and subsequent business results

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Plan to evaluate business results	Plan identifies what data to gather and analyze
	Plan identifies when to conduct evaluation
	Plan includes benchmarks of pre-intervention business results
	Plan includes an estimate of resources required to implement evaluation plan
Assessment of business results	Gap between pre-intervention, current, and desired business results is identified
	Results are stated in terms of specific existing business measures
	Results are based on accurate and reliable data and sound analysis
	Cause-effect relationships are determined among intervention, performance outcomes, and business results, if possible
	Assessment determines the appropriateness of business measures in light of actual business results
Recommended changes to learning solution (including support for transfer)	Recommendations are based on analysis of how the learning solution has affected performance outcomes and subsequent business results
	Recommended changes support the achievement of desired performance outcomes
	Recommendations are realistic for the organization and work unit

CONSIDERATIONS FOR GENDER-INCLUSIVE PROGRAMS



INTRODUCTION

Why focus on gender-inclusive learning programs?

Across the world, there is increasingly widespread recognition of the critical need for gender equality. Closing the economic, employment, health, and education gaps between men and women is not only a social and moral imperative, but it is an economic necessity too. A World Bank study found that countries are losing \$160 trillion in wealth across the world because of differences in lifetime earnings between women and men.¹ In addition, a 2017 study by the International Labor Organization found women’s participation in the global labor market remains 27 percent lower than for men. Research by the McKinsey Global Institute suggests that \$12 trillion could be added to global GDP in 2025 if every country matched the fastest progress made within its region toward gender parity.²

Overcoming this challenge is particularly important for emerging markets, which urgently need to maximize their human capital for economic growth. However, some of the world’s poorest countries also exhibit some of the largest gender gaps, severely restricting the ability of girls and women to fulfil their potential as productive members of society.

There are multiple factors holding back women’s full participation as employees, entrepreneurs, consumers, and business leaders. Women own or run more than one-third of the small and medium enterprises in emerging markets. Yet, one of the biggest barriers to their growth is lack of finance—amounting to an estimated \$1.48 trillion for women-owned small and medium enterprises.³ Women also lack access to markets, technology, information, and peer-to-peer networks. The amount of time women spend on household duties and caregiver duties is threefold that of men. This work has an estimated value of \$10 trillion, representing 13 percent of global GDP, but it is most often unpaid.⁴ Women also face greater risk of violence and harassment when using public transportation, impeding their ability to travel to

In 2015, all the United Nations member states adopted a series of 17 critical Sustainable Development Goals (SDGs), and pledged to work together to achieve these by 2030. SDG 4 seeks to “ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.” SDG 5 aims to “achieve gender equality and empower all women and girls.”

and from work and school.⁵ Legal, social, cultural, or personal barriers can also hamper their ability to contribute economically.

All these factors underscore the need for gender-inclusive learning programs. Enabling women to fully participate in training programs would equip them with the skills and knowledge needed for the economies of the future. It would help countries grow vital human capital and unleash women’s tremendous, yet often untapped, potential as entrepreneurs and employees, driving growth and improving the lives of families and communities, especially in emerging markets where it is needed most.

Putting gender-inclusion into action

Gender-inclusive programs take into account specific issues that may disproportionately limit the participation of women. For example, they factor in mobility and safety constraints by providing secure transportation, accommodate family responsibilities by scheduling training around school hours, address different education levels by tailoring course content, and help women believe in their own abilities by offering activities that build their self-confidence. These programs also focus on skills development by offering access to mentoring, coaching, and peer networks.⁶



How to use this supplement

This supplement provides additional information on how to implement the tasks presented in the Guide to Training in a way that enables equal access to learning programs for both men and women. It incorporates sample questions and evidence-based tips and approaches based on international best practices and lessons learned. While not exhaustive, these considerations help to guide the development and implementation of gender-inclusive training programs. End notes provide additional explanation, examples, and resources. The information in this publication is appropriate for a wide range of participants, including women entrepreneurs, employees, business leaders, consumers, and community stakeholders. Above all, it focuses on increasing women's participation and engagement in training programs and, subsequently, their representation in the workforce and economy.

How are the gender-inclusive considerations structured?

Participants must be the central focus of any performance and learning program. If participants' needs are not properly addressed, they will not fully absorb and apply the concepts taught during training. Many factors influence participants' needs, but there are three broad categories of considerations:⁷

- **Country:** The effect of community, social mores, gender perceptions, political events or affiliations, religious beliefs, laws, policies, infrastructure, available technology, and collective safety on the development, implementation, and results of a performance improvement program.
- **Individual:** The impact that personal factors, characteristics, personality, knowledge, skills, ability, mindset, and formal and informal networks have on a participant's ability to join and actively participate in a program and learn and use what the program teaches.

- **Family:** The time and energy constraints of household obligations and caregiving responsibilities, the involvement of family members in decision-making processes that determine a participant's ability to participate or engage with the program.

For each category below, you will find considerations, tasks, key questions, tips, and approaches for conducting gender-inclusive programs or programs targeted to women in emerging markets. They supplement the competencies, supporting competencies, and tasks found in the main Guide to Training document.

The competencies are grouped into the seven phases typically found in any training project lifecycle. These include *Assessing Performance Needs*, *Designing Curricula*, *Designing Learning Experiences*, *Facilitating Learning*, *Supporting the Transfer of Learning*, and *Evaluating Learning*. Throughout the project phases, it is critical to maintain a strong relationship with clients. That's why *Partnering with Clients* is positioned at the center of the project lifecycle, touching all other phases.



FIGURE 1: The competency wheel

**TABLE 1:** Definitions of each consideration category for gender-inclusive programs

CONSIDERATIONS	KEY FACTORS	DEFINITION
Country External factors may influence development, implementation, and results of a performance improvement program. While these tend to be outside a training professional's direct control, they may still need to be addressed or considered in the design, implementation, and evaluation of learning programs.	Social and cultural norms	Local sensitivities including traditions and cultural customs, religious beliefs and practices, socially imposed identity roles (for example, gender, racial, tribal, religious, class and political affiliation).
	Economic stability	Strength, sophistication, and openness of the market (state-owned versus private sector), level of employment, and potential for business opportunities. Economic conditions and existing regional development programs or stimulus packages could affect the amount of funding available for learning programs or the fees that these programs could charge to participants.
	Legal environment	Local laws, regulations, and policies, including laws affecting women's agency and freedom of movement; ownership, inheritance, and management of assets; and starting and running a business.
	Technology	Accessibility, availability, and reliability of information and communication technology at the program location.
	Infrastructure and logistics	Accessibility, availability, and reliability of venues, utilities, sanitation, transport, catering accommodation, and other services.
	Security and safety	Protection from issues related to political conflict, terrorism, violence, gender-based violence and sexual harassment, or collective post-conflict trauma for participants, program providers, and all those affiliated with the performance improvement program.
Individual Personal factors, characteristics, and circumstances of participants in a performance improvement program. A training professional may be able to influence several of these factors.	Confidence⁸	Level of confidence including self-confidence, self-efficacy, and error competency and its effect on the individual's ability to learn, apply, and demonstrate knowledge and skills. <i>Self-confidence</i> is the feeling of trust in one's abilities, qualities, and judgment. Confidence is a skill that can be developed. <i>Self-efficacy</i> is the belief that one can succeed or accomplish a task. <i>Error competency</i> is the ability to recover from errors.
	Leadership	Leadership skills including assertiveness, self-advocacy, and resilience to overcome adversity and aspirational barriers ranging from responding to social norms to dealing with trauma. <i>Assertiveness</i> is the skill of standing up for oneself and others. <i>Self-advocacy</i> is the skill of taking responsibility for representing one's own views, rather than having others act on one's behalf. <i>Resilience</i> is the capacity to recover from difficulties and the ability to persevere in the face of adversity.
	Education & skills	An individual's current level of knowledge, skills, and abilities in a given subject.
	Networks	An individual's formal or informal relationships with peers, mentors, coaches, business links, etc., that complement or support sustained performance before, during, and after a program. ⁹
	Finance and assets	An individual's financial capability to engage in a performance improvement initiative (for example, ability to pay for enrollment fees or take time off work or business to participate).
Family Household obligations of participants of a performance improvement program. These often pose additional challenges for women. A training professional may be able to accommodate several of these factors.	Availability	Time constraints that participants face in balancing household duties and other responsibilities.
	Care responsibilities	Factors and constraints impacting care-givers in a family.
	Decision making/agency	The ability of women to make decisions and take advantage of opportunities (for example, having a say in household finances and their own personal development). ¹⁰



GENDER-INCLUSIVE CONSIDERATIONS WHEN PARTNERING WITH CLIENTS

Throughout the project’s entirety, maintaining a strong relationship with the client is critical for success. That is why *Partnering with Clients* lies at the center of the competency wheel, touching all phases of the project cycle. In this section, we advise you on steps to take and issues to consider as you work with your client to implement the different phases. We group these tasks and considerations into factors that are unique to emerging markets; we do not intend to imply a sequential order. The tasks and considerations selected aim to expand the way the client thinks about training programs and the importance of equal access for both men and women participants. For example, we include *social norms* to help you understand the different needs of women and men participants; *technology* to make the point that you may have to use different delivery channels to reach men and women; and finally, to suggest that you may need to offer *additional services* to complement the training, such as mentoring, coaching, and childcare services. For a fuller picture of the overall sequential tasks this competency entails please refer to the main *Guide to Training*.

As a reminder, the main objectives of *Partnering with Clients* are:

- Get the input you need to achieve or exceed expectations on an assignment.
- Expand the way you and your client think about effective and innovative solutions.
- Meet the needs of both the participant and the organization sponsoring the project.
- Minimize misunderstandings, surprises, or disappointments.
- Build commitment to implement solutions.
- Complete projects on time and within budget.
- Maintain client satisfaction throughout the project.

When *Partnering with Clients* to design and deliver gender-inclusive programs or programs specifically targeted to women, it is important to understand how the organization, and especially its leadership, perceives women as employees and business leaders. Be prepared to present the business case for gender-inclusive programs that allow both men and women to participate equally and discuss specific program activities and support that make the program effective for both genders. For example, mentoring and coaching have shown great results for women in applying their learning.¹¹

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
Country		
SOCIAL AND CULTURAL NORMS		
<p>Determine how women are perceived in the client’s organization and communicate to clients and stakeholders how gender equality can benefit their organization</p>	<ol style="list-style-type: none"> 1. What are the client’s expectations about programs that promote gender equality or aim exclusively at women? 2. How can you educate yourself on the issues that hinder women from participating in programs? 	<ul style="list-style-type: none"> › Educate yourself on gender-inclusive issues and dynamics and the business case for learning programs specifically targeted to women.¹² › Assess the client or project sponsor’s awareness of issues related to gender inclusion, such as the constraints that society places on women and the impact those constraints have on their ability to acquire knowledge or improve their economic standing.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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SOCIAL AND CULTURAL NORMS (cont.)

<p>Determine how women are perceived in the client's organization and communicate to clients and stakeholders how gender equality can benefit their organization</p>	<ol style="list-style-type: none"> How can you educate your client about the business case for gender-inclusive learning and training programs? How can you educate clients on the issues that hinder women from participating in programs? 	<ul style="list-style-type: none"> Increase women's representation in project planning by inviting more women to participate as members of the project review committee/project management team. Strive for a minimum of 30% female representatives on such committees.¹³ Research the business case for gender-inclusive programs. Many international and non-governmental organizations provide white papers, books, videos, or other educational information on these topics. Identify the priorities of business lines or work units, including gender-inclusive initiatives and priorities, if any.
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TECHNOLOGY

<p>Explore viability of digital solutions</p>	<ol style="list-style-type: none"> Can the client support digital learning? How involved does the client want to be in operating, funding, or designing digital learning as part of the program? Are high data costs of webinars, etc. going to be a barrier? 	<ul style="list-style-type: none"> Blending learning solutions, such as face-to-face sessions with online learning, can offer more flexibility and variety to the program. Women participants in some cases show preference for online learning.¹⁴ Determine cost of data when proposing digital solutions as part of the program.
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INFRASTRUCTURE AND LOGISTICS

<p>Discuss communications requirements</p>	<ol style="list-style-type: none"> What are the appropriate and available channels for communicating with participants? 	<ul style="list-style-type: none"> Agree with clients on appropriate communications channels for both men and women participants, for example, email, phone, WhatsApp for RSVPs and sign-up.
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SECURITY AND SAFETY

<p>Discuss participant safety</p>	<ol style="list-style-type: none"> Are there safe venues and transport options for participants, and women in particular? Can the client or program sponsor provide transport, such as a minibus to offsite venues? Is the client willing to pay for overnight accommodation? 	<ul style="list-style-type: none"> Discuss participants' mobility and safety constraints.¹⁵ Find a safe and convenient venue at the client's location or consult with local experts on alternatives.¹⁶ Discuss costs and safety of different options.
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Individual

NETWORKS

Explore mentoring and coaching¹⁷

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| <ol style="list-style-type: none"> 1. Are good mentors and coaches available in the local market? 2. Is the client able to provide this service? 3. Are there potential collaborators that can be tapped, locally or globally? 4. Would the client be willing to pay for in-person, phone, or online coaching? 5. Would mentoring or coaching complement a training program or be provided as a standalone option? | <ul style="list-style-type: none"> › Use mentoring or coaching after training to increase the likelihood that participants continue to use what they learned in class.¹⁸ › Discuss costs, time, and benefits of providing mentors or coaches. › Consider using phone or online mentoring as a lower-cost alternative to in-person mentoring. › Consider using group coaching as a lower-cost alternative to individual coaching. › Provide networking and coaching assistance to both men and women entrepreneurs at the early stage of their business.¹⁹ |
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FINANCE AND ASSETS

Consider use of incentives

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| <ol style="list-style-type: none"> 1. What supports (for example, stipends, meals, transportation) may be necessary to encourage both men and women participants? 2. Would participants be attracted to the program because of the supports rather than for the learning opportunities? | <ul style="list-style-type: none"> › Avoid offering incentives that can be easily commandeered by family members. › Try to use non-financial supports valued by program participants (for example, meals during training, transport to and from training venues).²⁰ › If offering stipends, administer them regularly and deliver them through a transparent mechanism.²¹ |
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CONSIDERATIONS
AND TASKS

QUESTIONS

TIPS AND APPROACHES

Family

CARE RESPONSIBILITIES

Explore ways to boost and enhance female participation in the program

1. What options can the program offer participants who have caregiving responsibilities?
2. Is the client willing to support childcare for mothers/parents attending the program?²²
 - Suggest alternative options to accommodate participants' family responsibilities, for example, schedule training during daylight hours while avoiding the early morning or late afternoon and evening, avoid trainings on weekends when families spend time together align training hours with school and daycare operating hours, if applicable, avoid offsite or multi-day programs, start and end on time, and ensure a convenient location (for example, with public transport access, ample parking).
 - Increase the clients' awareness of how childcare issues can hinder women from attending the program and provide viable mitigation strategies, such as the client covering the cost of childcare and providing safe transport for parents and children.²³ Depending on parents' requirements, the client may choose to offer a childcare subsidy, voucher, or free or subsidized spots at a childcare center close to the training venue.

GENDER-INCLUSIVE CONSIDERATIONS WHEN ASSESSING PERFORMANCE NEEDS

Time and resources needed to properly assess performance can vary greatly. You may need to spend a few hours clarifying what participants should be able to do after a learning experience. Or you may need to conduct an in-depth needs assessment and determine a training strategy for a complex performance issue that involves many work processes, functions, and roles.



As a reminder, the main objectives of *Assessing Performance Needs* are:

- Have facts that support assumptions.
- Address the right problems and causes.
- Avoid rushing into a learning solution.
- Identify the best solution or blend of solutions.
- Determine how to evaluate results.

When *Assessing Performance Needs* to design and deliver gender-inclusive programs or programs

specifically targeted to women, it is important to clarify who will be participating in the program.

To decide on the requirements of the program, a thorough analysis of the local culture, both women and men participants' education and knowledge levels, their overall level of confidence and leadership skills, and family decision-making and caregiving responsibilities is required. For example, if a digital solution is proposed, check women participants' degree of confidence and comfort with online learning. Women often face connectivity and skills gaps²⁴ but find online tools can support learning while time-poor.²⁵ Remember to include women or women's perspectives in assessing program needs and designing curricula, whether targeting women only or both genders. This can be achieved by including women in the assessment and design team/s or interviewing women who represent the target audience for the curricula.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
Country		
CULTURAL AND SOCIAL NORMS		
<p>Examine local social views and belief systems</p>	<ol style="list-style-type: none"> 1. What external influences (cultural, societal, or religious factors) impact program design, content, participation, or delivery? 2. How does local society perceive women in business? Does the local society support women's participation as employees in the formal workforce? 3. What are the barriers to gender inclusion? 	<ul style="list-style-type: none"> ▸ Include women in the assessment team(s) and interview women who represent the target audience. ▸ Inquire about participants' day-to-day lives so you can align your program with their training preferences and goals.²⁶ ▸ Determine whether local cultural mores require separate sessions for women or if women participants prefer separate, women-only programs. In some cases, a mixed-gender program may provide more learning opportunities on leadership skills for women by getting them exposed to various styles of leadership across men and women.²⁷ ▸ Consult with trusted local experts on perceptions of women in the workplace or as business owners. ▸ Evaluate the role that local media play, or could play, in the perception of women entrepreneurs and employees.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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CULTURAL AND SOCIAL NORMS *(cont.)*

Determine implications of using a male or a female facilitator²⁸	<ol style="list-style-type: none"> 1. Do participants prefer a female or male facilitator? Will this impact the entire program or only some sessions? 2. Are sufficient male or female facilitators available? 	<ul style="list-style-type: none"> ▸ Ask potential target participants if they would be more comfortable with a facilitator of the same gender (for example, women-only programs may favor female facilitators for some topics). ▸ Consider using co-facilitators, one of each gender.
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LEGAL ENVIRONMENT

Determine how women's legal status might impact the program	<ol style="list-style-type: none"> 1. Is there a law that could restrict women's access and ability to benefit from the program? 2. Are women permitted to drive or travel on their own? 	<ul style="list-style-type: none"> ▸ Identify implications of women's legal status²⁹ on program design, content, attendance, or objectives (for example, if the program aims to increase economic participation of women, their ability to own assets, have a bank account, or own a mobile phone can affect greatly the outcome. If women are not permitted to drive, choosing a venue in proximity to them or providing transportation options might be necessary).
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TECHNOLOGY

Identify alternatives to face-to-face learning	<ol style="list-style-type: none"> 1. Is face-to-face learning the most accessible, effective, and cost-efficient approach for participants? 2. Would participants feel comfortable with remote and digital training?³⁰ 3. Are participants digitally literate? Do they trust digital sources?³¹ 4. What is the cost of internet connectivity? 5. Who controls access to digital tools? Is permission needed? From whom? 	<ul style="list-style-type: none"> ▸ Determine if the trade-off between scalability, accessibility, cost, and effectiveness is acceptable to justify using a digital alternative. ▸ Determine how best to accommodate the acquisition of computer and digital skills, if lacking. ▸ Identify local educational institutions or community centers with computer facilities where program participants could regularly convene at times that suit their schedules and household responsibilities.
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INFRASTRUCTURE AND LOGISTICS

Determine mobility constraints	<ol style="list-style-type: none"> 1. Is participants' mobility restricted? If so, how? 2. Is overnight accommodation needed or appropriate? 	<ul style="list-style-type: none"> ▸ Weigh the costs and benefits of how different logistical scenarios or delivery methods influence participation.³² ▸ Determine whether participants require transportation for themselves and their children.
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SECURITY AND SAFETY

<p>Examine unintended consequences (such as gender-based violence) of the program on participants</p>	<ol style="list-style-type: none"> 1. How might joining the program negatively affect men or women participants? 2. From where are repercussions most likely to come? 	<ul style="list-style-type: none"> ▶ Create plans for mitigating negative repercussions before they occur, both at the venue and on transport routes. ▶ Confirm if it is safe for participants to travel to and from the program venue.³³ ▶ Choose safe travel times and routes (for example, when daylight hours are longest). ▶ Communicate the benefits of the program for the community. ▶ Keep participation confidential and ask individual participants to consider what they tell their family members and the public about their participation.
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Individual

CONFIDENCE AND LEADERSHIP

<p>Assess the need to integrate self-confidence building activities into the program^{34,35}</p>	<ol style="list-style-type: none"> 1. How will you evaluate the participants' level of confidence and measure changes? 2. What changes do participants expect post-program? What changes do clients expect post-program? 3. What networks exist among women that can be leveraged to increase their confidence? 	<ul style="list-style-type: none"> ▶ Find local role models with similar backgrounds who can share their experiences and inspire confidence. ▶ Consider offering Personal Initiative Training or building components of it into the program to develop self-advocacy, resilience, self-confidence, and risk taking.³⁶ ▶ Identify previous or current programs that local women have taken to build their confidence to avoid offering the same program again and to establish a baseline upon which to build the program.
<p>Determine importance of recognizing achievement in building self-confidence</p>	<ol style="list-style-type: none"> 1. Would recognizing the achievements of program participants in this community benefit the participants or the program? 2. Is it possible or necessary to provide externally recognized certification? 3. Should family members (for example, male heads of households, spouses, etc.) be invited to some or all of the program to build support and recognition? 	<ul style="list-style-type: none"> ▶ Explore whether increased visibility and recognition would help build self-confidence of program participants. ▶ Determine whether externally recognized certification would be valued by participants in your program. ▶ Consider permitting family or male heads of households to attend women-focused programs to increase the likelihood that women can implement learnings after the program concludes.^{37,38} ▶ Consider organizing high-profile graduation ceremonies. Community and external recognition of participants can contribute to their confidence and sense of leadership.^{39,40,41}

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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CONFIDENCE AND LEADERSHIP (cont.)

Assess how building leadership skills may benefit participants and program results	<ol style="list-style-type: none"> 1. What is the participants' level of leadership, assertiveness, and resilience skills?⁴² 2. How will you measure whether the program has succeeded in building participants' leadership, assertiveness, and resilience skills?" 	<ul style="list-style-type: none"> ▸ Examine experience of participants in learning, applying, and sharing or demonstrating knowledge and skills similar to those taught in your program. ▸ Determine participants' and client's expectations of how participants will use and share their learnings from your program. ▸ Identify key success indicators of improved leadership skills.
Assess how building problem-solving skills may benefit participants and program results	<ol style="list-style-type: none"> 1. How developed are the participants' problem-solving skills?⁴³ 	<ul style="list-style-type: none"> ▸ Create relevant examples, case studies, and discussion questions that will develop problem-solving and critical thinking skills.

EDUCATION AND SKILLS

Consider demographics and eligibility criteria for the program	<ol style="list-style-type: none"> 1. What are the typical differences among participants, in the level of education, skills, and knowledge required to participate in the program? 	<ul style="list-style-type: none"> ▸ Determine whether a gender gap exists in level of education, skills and knowledge required for the program and find ways to close that gap. ▸ Determine whether pre-program training might be required for participants. ▸ Check that eligibility criteria do not preclude or discourage participants—men or women.
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NETWORKS

Determine viability of coaching and/or mentoring for your program	<ol style="list-style-type: none"> 1. Is coaching and/or mentoring feasible? 2. Could local women's networks provide women role models to serve as mentors/coaches? 3. Would men be willing to be mentored/coached by women? 4. Would women be willing to be coached in person by men? 5. Would women coaches/mentors be willing to travel to their protégés? 	<ul style="list-style-type: none"> ▸ Identify a diverse pool of coaches (for example, by gender, race, tribe, religion, or political affiliation). ▸ Determine feasibility of pairing participants with mentors of the opposite gender.
Assess need to provide women role models in your program⁴⁵	<ol style="list-style-type: none"> 1. Have you interviewed women stakeholders (targeted audience, trainers, management) to identify women's needs and concerns? 2. Would the presence of women role models increase program participation? 	<ul style="list-style-type: none"> ▸ Assess the presence of supportive role models in the lives of participants.⁴⁴ ▸ Identify local role models who can help address participants' (both men's and women's) needs and concerns.



NETWORKS (cont.)

<p>Determine the influence of social networks and peer learning on your program</p>	<ol style="list-style-type: none"> 1. How much influence do friends and family have on women’s ability to implement what they learned in the program? 	<ul style="list-style-type: none"> ▸ Consider offering peer-to-peer or business-to-business networking in conjunction with training to help participants grow their networks with other business people, vendors, suppliers, or lenders.⁴⁶ ▸ Consider establishing a network of program alumni who can support each other and sustain the program.
<p>Map the ecosystem of programs in your region which target women or focus on gender inclusion</p>	<ol style="list-style-type: none"> 1. How saturated is the local capacity building market? Are the same people getting the same opportunities from multiple organizations? 2. What topics are most popular with participants? What topics or program delivery modalities are not being offered? What is the quality of current capacity building programs? 	<ul style="list-style-type: none"> ▸ Identify overlaps and synergies among program offerings and determine ways to dovetail your program or partner with others. ▸ Identify possible resistance from a sponsor to coordinating with other programs.

FINANCE AND ASSETS

<p>When training women entrepreneurs consider offering access to finance solutions</p>	<ol style="list-style-type: none"> 1. How can your curriculum support opportunities to access finance? 	<ul style="list-style-type: none"> ▸ Explore how you can link and bundle your program to targeted assistance from lenders who are actively pursuing the women’s market as a consumer segment.⁴⁷ For example, women who have received both training and targeted assistance are found to employ good business practices such as bookkeeping and increased reliance on formal credit. Use of credit, mostly from informal sources, increased for all beneficiaries of such programs.⁴⁸
<p>Determine affordability of your program for your client and participants</p>	<ol style="list-style-type: none"> 1. Is there a gap between what men and women participants can afford to pay for the program? 2. How can the program sponsors reduce the gap? 	<ul style="list-style-type: none"> ▸ Ask potential participants whether and how much they would be willing to pay. ▸ Use local providers as much as possible to reduce program costs. ▸ Explore potential program sponsors. ▸ Consider the viability of using online or blended learning options to help offset logistical costs.

CONSIDERATIONS
AND TASKS

QUESTIONS

TIPS AND APPROACHES

Family

CARE RESPONSIBILITIES

Identify factors and constraints for care providers

1. How do participants' family caregiving responsibilities impact their time and ability to participate in a program?
 2. What types of caregiving support might make it easier for participants to attend and fully participate in the program?
 3. What would it cost to provide good quality, affordable childcare?
 4. If offering childcare, should it be free or subsidized?
- Consult parents potentially participating in the program to better understand their care needs, challenges, and preferences.
 - Consider available childcare services for participants who are parents and caregivers. Consider aspects such as the quality, affordability, availability, and ease of access/ convenient location of childcare, that is close to or preferably inside the training venue, especially if it is an all-day training.⁴⁹
 - Consider providing safe transport options for parents and children to and from the training venue and childcare facility, if needed.
 - Consider providing breastfeeding and lactation accommodations for parents who require such assistance.⁵⁰
 - Depending on parents' requirements, the client may choose to offer a childcare subsidy, voucher, or free or subsidized spots at a childcare center close to the training venue.

DECISION-MAKING/AGENCY

Identify household decisions makers to consult in connection with your program

1. Do women participants require permission from their spouses or families to attend? Do they make decisions on their own, in consultation with family members or business partners, jointly with family members or business partners, or are they unable to influence decision-making?
 2. What access do individuals have to products or services that may be referenced by the program?
- Establish the role women play in decision-making and who or what tools are available when making those decisions.⁵¹
 - Determine who in the household needs to be convinced that both men and women would benefit from participating in the program.
 - Develop a list of objections that a household decision-maker might raise and identify suitable responses, including benefits for the household.
 - Check alignment of desired program outcomes (such as financial independence through increased personal savings) with level of agency of participants (are they able to access or use a savings account?)

GENDER-INCLUSIVE CONSIDERATIONS WHEN DESIGNING CURRICULA

Designing Curricula refers to the design of frameworks for interrelated learning experiences, activities, and materials intended to build participants' competence and confidence. The curriculum makes the high-level program strategy more concrete and tactical and acts as a roadmap for the *Designing Learning Experiences* competency. It provides higher-level learning objectives, learning experience outlines, and summaries of learning activities within a learning experience. It identifies the duration of each section of the learning experience and identifies how to measure successful completion of each related learning objective. Needs assessment results directly contribute to the decisions made about the curriculum design.

As a reminder, the main objectives of *Designing Curricula* are to:

- Sequence learning objectives and performance outcomes, so that participants can start applying new knowledge on the job as soon as possible.
- Sequence learning to optimize retention.
- Identify and integrate other goals (for example, personal development or understanding) where feasible.

- Identify the most effective formats and channels for participants.
- Identify a specific path for each job role or experience/education/skill level.
- Identify ways to potentially reuse components of the curriculum at the start of the project, thereby promoting efficiency in developing experiences and materials.
- Specify guidelines, templates, and similar resources to promote consistency during development.
- Integrate cognitive and psychomotor learning effectively.
- Pilot and test various components of the curriculum before full-scale development or rollout of all the experiences and materials.

When *Designing Curricula* for gender-inclusive programs or programs specifically targeted to women, remember to involve women in the design team in order to incorporate the women's perspective, for example, scheduling around caregiving responsibilities, building confidence and leadership skills, and filling education and technology gaps.

CONSIDERATIONS AND TASKS

QUESTIONS 

TIPS AND APPROACHES 

Country

TECHNOLOGY

Determine viable digital solutions

1. What digital solutions would enhance both men and women participants' learning (for example, webinars, social media)?
 - Develop a combination of low-tech and high-tech solutions and self-study materials (for example, combining radio broadcasts with self-study booklets, using mobile phones for viewing self-study videos or answering quiz questions, using SMS reminders and social media to support learning).
2. What additional support may be required to familiarize participants with use of the chosen technology?
 - Consider making online platforms available to participants, such as Facebook and LinkedIn groups, so they can share business contacts and successes.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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Individual

CONFIDENCE AND LEADERSHIP

Incorporate activities to build confidence, if needed	1. How can your curriculum build in short-term wins and error recovery activities to build women's confidence?	<ul style="list-style-type: none"> ▸ Focus on activities that increase participants' self-confidence, self-efficacy, and error competency.⁵² ▸ Offer opportunities to practice and reinforce what has been learned.
Incorporate activities to build leadership skills, if needed	1. What activities, such as case studies, roleplays or simulations, can you include to promote leadership, assertiveness, and resilience?	▸ Incorporate personal initiative objectives in the curriculum where appropriate. ⁵³
Incorporate activities to build problem-solving skills	1. What activities, such as case studies, roleplays or simulations, can you include to promote critical thinking and problem solving?	<ul style="list-style-type: none"> ▸ Use robust case studies, which require participants to analyze, synthesize, and evaluate. ▸ Use questions and examples for which there is not one correct answer but several possible points of view.

NETWORKS

Incorporate coaching and/or mentoring into your program	<ol style="list-style-type: none"> 1. What coaches and/or mentors will you use in the program? How specifically will you involve them? 2. How can you build trust between the coach/mentor and the participant? 	▸ Identify the most convenient ways to organize mentorships (for example, face-to-face meetings or via phone or online), taking into consideration logistical, societal, or familial issues that may limit participation.
Plan for women role models	<ol style="list-style-type: none"> 1. Who can inspire participants? 2. Are women role models also available to serve as facilitators? 	<ul style="list-style-type: none"> ▸ Decide how best to include role models (for example, key presentations, support during activities). ▸ Allow time in the curriculum for guest speakers, such as woman business leaders, to talk about issues of concern to women entrepreneurs.⁵⁴
Plan for social networks and peer learning	1. Does the program design allow participants to interact with local leaders or community or business networks?	▸ Embed approaches that encourage the development of networks or build upon existing networks. ⁵⁵



Family

AVAILABILITY TO PARTICIPATE

Consider time constraints of participants

1. What training schedule is most suitable?
2. How can you design the curriculum to accommodate shorter training sessions?

- ▶ Break a single, long, multi-topic program into a series of shorter programs, each focusing on a separate topic.

CARE RESPONSIBILITIES

Create program activities and schedules that accommodate the participants' family responsibilities

1. How might program activities accommodate participants' family responsibilities?

- ▶ Incorporate activities such as homework assistance for school-age children so that mothers can attend the program.
- ▶ Schedule sessions around children's school timetables.
- ▶ Provide breaks for breastfeeding and lactation.
- ▶ Provide meals during the program to reduce care-giving pressures.
- ▶ Convert class assignments to homework to give participants greater scheduling flexibility.

DECISION-MAKING/AGENCY

Consider how to engage those family members who determine participation in your program

1. How can the program involve influential family members?

- ▶ If providing a women-focused program, identify ways to involve men⁵⁶ in the family group, including inviting them to attend the program or explaining the benefits of educating women on the subject.

GENDER-INCLUSIVE CONSIDERATIONS WHEN DESIGNING LEARNING EXPERIENCES



Designing Learning Experiences focuses on planning and developing learning experiences, from creating a 15-minute self-paced e-learning tutorial to setting up a social platform for employees to learn from each other and creating instructor-led training delivered in a classroom or even in a field. Designing Learning Experiences starts with a clear understanding of the business measures and desired performance outcomes. All content and activities should align directly with achieving these outcomes and measures. The outputs for *Designing Learning Experiences* can include facilitator and participant guides, presentation slides, reference material, job aids, e-learning, self-study materials, tools, posters, or other learning material, train-the-trainer sessions, class scheduling, and logistics.

As a reminder, the main objectives of *Designing Learning Experiences* are to:

- Align learning objectives with desired performance outcomes and business measures.
- Include “need to know” content instead of “nice to know.”

- Present content clearly and concisely.
- Provide frequent and effective practice opportunities.
- Create materials that support learning.
- Create tools and methods to measure the participants’ new skills and knowledge.
- Create tools and methods to measure how much of the learning participants use in the “real world.”
- Design learning experiences that enable your facilitators and participants to succeed.
- Prepare for delivery.

When *Designing Learning Experiences* for gender-inclusive programs or programs specifically targeted to women, remember to consider what content, activities, and support may work best for participants with differing literacy, education, or confidence levels and remember to organize course schedules around participants’ family and caregiving responsibilities.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
Country		
CULTURAL AND SOCIAL NORMS		
Use appropriate language, examples, and images	1. Is the program content and material relevant to men and women participants?	<ul style="list-style-type: none"> ▸ Avoid stereotypical images of male and female roles. Use examples that both men and women can relate to. ▸ Maintain an appropriate balance of gender representation. ▸ Use non-business language which is easy to understand to engage both men and women participants. ▸ When creating content, include a balanced mix of male and female pronouns.



TECHNOLOGY**Design digitally-based learning experiences**

1. How can the selected technology best support the learning approaches preferred by participants (men and/or women)?
2. Does the program include accessible digital tools that can be used as a reference in future? How can digital solutions support application of learning (knowledge sharing, emotional support, homework)?

- Develop short learning videos, quizzes, tutorials, or reminders that participants can view on standard or smart phones.
- Design digital tools that participants can access easily after the program.

INFRASTRUCTURE AND LOGISTICS**Decide on the appropriate gender for the facilitator and provide gender awareness training if needed**

1. What is the preferred gender for the facilitator (preferred by the participants and/or culturally accepted)?
2. Are program providers aware of gender differences?
3. What guidance or training might program providers need?

- If a facilitator of the preferred gender is unavailable consider digital options (for example, provide training via a webinar).
- Consider offering gender awareness training to facilitators to increase their sensitivity to issues both men and women participants may face.⁵⁷

Use appropriate channels and language to raise awareness about the program

1. What are the best marketing channels to reach your target audience?
2. Is the language of the marketing material appropriate for the target group?

- Use both formal and informal communication channels to reach household decision-makers and both men and women participants.
- Identify community leaders who can champion the program.
- Use branding and explanatory language that resonates with both men and women and addresses their issues directly.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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Individual

CONFIDENCE AND LEADERSHIP

Find ways to recognize participants' achievements	1. What recognition can be offered to participants through media coverage, award ceremonies, etc.?	<ul style="list-style-type: none"> ▸ Consider organizing a graduation ceremony. If taking photos during a program graduation event, determine if it is safe to share these photos or participants' stories with others in the community.
Incorporate self-confidence building activities	1. How can you embed or encourage confidence building in learning activities?	<ul style="list-style-type: none"> ▸ Include examples, case studies, and role plays that foster self-confidence, self-efficacy, and Personal Initiative Training.⁵⁸ ▸ Include debriefing questions to support self-confidence and resilience.
Incorporate leadership building activities	1. How can you develop leadership skills through the learning experience's activities and discussions? 1. Do debrief questions incorporate discussion questions around leadership, assertiveness, and resilience?	<ul style="list-style-type: none"> ▸ Develop leadership skills and an increased sense of empowerment indirectly through training activities, such as: <ul style="list-style-type: none"> • Group learning in which women are chosen as group leaders. • Promotion of interactions between women and relevant market players and/or peers.^{59,60} • Examples, case studies, roleplays, or simulations.

EDUCATION AND SKILLS

Consider education levels	1. Are learning and marketing materials appropriate for the educational and literacy level of the participants?	<ul style="list-style-type: none"> ▸ Use language that accommodates the lowest educational level likely to in the audience.⁶¹ ▸ Identify remedial training or assistance if education levels need bolstering
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NETWORKS

Plan for coaching and/or mentoring	1. How can coaching or mentorship support proposed topics and activities?	<ul style="list-style-type: none"> ▸ Intersperse individual mentoring with classroom sessions to keep personal involvement and connection high.
Plan to include women role models as guest speakers	1. Do speakers share similar backgrounds to those of the participants?	<ul style="list-style-type: none"> ▸ Identify successful role models⁶² who can encourage participants to apply the concepts taught to their own businesses.⁶³ ▸ Leave time in the learning experience to allow for relatable, local, role models to speak to the group.⁶⁴
Include social networks and peer learning	1. How can the learning experience design encourage peer learning?	<ul style="list-style-type: none"> ▸ Design activities which leverage peer relationships to encourage completion (for example, establishing a program where participants get together in the village to jointly watch the training session and discuss it afterwards, like a book club). ▸ Include activities where participants work in groups to solve the problem or answer the question.



GENDER-INCLUSIVE CONSIDERATIONS WHEN FACILITATING LEARNING



Facilitating Learning can range in scope from coaching a few people to leading a webinar with hundreds or thousands of participants.

As a reminder, the main objectives of *Facilitating Learning* are to:

- Create an environment conducive to learning.
- Provide an engaging learning experience for your participants.
- Keep participants on task and accountable for their learning.
- Optimize opportunities for participants to interact and practice.

- Tailor learning experiences to the specific needs of individuals and groups.
- Help participants efficiently achieve the set learning objectives.

When *Facilitating Learning* for gender-inclusive programs or programs specifically targeted to women, gender awareness is key. Facilitators trained in gender awareness will be better prepared to address in class the cultural context and the issues women participants may face,⁶⁵ and foster the development of self-confidence, leadership, assertiveness, self-advocacy, and resilience.⁶⁶

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
<h3>Country</h3>		
SOCIAL AND CULTURAL NORMS		
Use appropriate language and examples	<ol style="list-style-type: none"> 1. Is the language used during facilitation appropriate for the target group? 	<ul style="list-style-type: none"> ▸ Use relevant examples or analogies to respond to questions or illustrate concepts. ▸ Make sure examples and analogies are sensitive to local gender, political, and religious norms. ▸ Talk at a level equal to the average educational level of the target audience. ▸ Remind facilitators and trainers to use female pronouns regularly or to use a balanced mix of male and female pronouns.
Create a gender-inclusive learning environment	<ol style="list-style-type: none"> 1. How can you make participants in the program feel more comfortable with the learning environment? 2. How might women and men behave towards each other during the course? 3. What actions need to be taken to create a respectful environment free from bullying and sexual harassment? 	<ul style="list-style-type: none"> ▸ Consider gender-balanced facilitation when offering programs targeted to women. ▸ Develop a respectful course guideline (ground rules on being respectful to other participants and their opinions).⁶⁷ ▸ Communicate the respectful course guideline at the beginning of the course. ▸ Ask participants, providers, and peers for suggestions on how to prevent or resolve the disruptive behaviors and create list of actions to address disruptive behaviors.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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CULTURAL AND SOCIAL NORMS *(cont.)*

<p>Create a gender-inclusive learning environment <i>(cont.)</i></p>	<ol style="list-style-type: none"> How can you mitigate disruptive behaviors (of participants or family members) during facilitation? What actions would need to be taken if bullying or sexual harassment occurs? 	<ul style="list-style-type: none"> Take action against disrespectful behavior if it occurs based on list of actions.
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Individual

CONFIDENCE AND LEADERSHIP

<p>Foster development of self-confidence and leadership skills into learning as needed</p>	<ol style="list-style-type: none"> How can you reinforce aspects of self-confidence, self-efficacy, and error competency as you facilitate learning? How can you reinforce aspects of leadership, assertiveness, self-advocacy, and resilience as you facilitate learning? 	<ul style="list-style-type: none"> In mixed classes, assign both men and women participants to leadership roles in small group activities so they gain experience and confidence in leading groups. In mixed classes, assign men as scribes or other “traditional female roles” to break stereotypes. Encourage open discussion of “appropriateness” of self-confidence and self-efficacy during debriefs and when discussing activities or topics. Make an extra effort to encourage both men and women to participate in group discussions or to lead their teams. Strengthen self-efficacy by asking participants to present during class and engage them in peer-to-peer learning activities.^{68,69} Develop error competency skills by engaging participants in activities where they can safely make mistakes and learn from those mistakes.
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NETWORKS

<p>Include peer-to-peer learning</p>	<ol style="list-style-type: none"> How can you facilitate activities to encourage peer-to-peer learning? 	<ul style="list-style-type: none"> Encourage participants to collaborate by creating training assignments that require working in pairs or trios, and to provide peer support and mutual technical support.
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GENDER-INCLUSIVE CONSIDERATIONS WHEN SUPPORTING THE TRANSFER OF LEARNING

Supporting the Transfer of Learning provides activities and materials that help participants to take what they have learned and apply it at work or at home. These follow-up interventions may include reminder emails, feedback and coaching by a manager or mentor, job aids, discussion forums, web-based tools, additional opportunities for practice, and recognition for changes in behavior.



Supporting the Transfer of Learning increases the probability that participants continue to use their new knowledge and skills after program completion. Design and development of this component should start when first designing learning experiences. It has its own phase/competency because of its importance to the successful application of learning.

As a reminder, the main objectives of *Supporting the Transfer of Learning* are to:

- Address considerations for transfer during the needs assessment phase.

- Design and develop materials to support the transfer of learning.
- Prepare coaches and mentors to support the transfer of learning.
- Position content and activities during the program to support the transfer of learning.
- Conduct transfer of learning activities.

When designing Transfer of Learning activities and materials for gender-inclusive programs or programs specifically targeted to women, remember to consider what women need to best reinforce their learning. Networks, peer support, and mentoring and coaching are particularly valuable in supporting women to apply their learning to their work and every-day lives. Remember to align learning interventions with participants' work schedules and family caregiving responsibilities. The considerations and tasks are similar to the *Designing Curricula* and *Designing Learning Experiences* phases and repeated here for quick reference.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
<h3>Country</h3>		
NETWORKS		
<p>Prepare coaches and/or mentors to support the transfer of learning</p>	<ol style="list-style-type: none"> 1. What gender factors should be considered when matching participants with mentors or coaches? 2. What incentives can coaches/mentors use to motivate participants to apply their learning? Are there differences between men and women that need to be taken into account? 	<ul style="list-style-type: none"> ▸ Make sure that coaches/mentors/role models are available on-site to support participants in developing their skills. ▸ Use mentors to track post-training activities of participants. ▸ Provide post-training support at times that are convenient for participants. ▸ Develop managers' coaching skills and awareness of gender equality issues, so that they can better coach employees who return from the program.⁷⁰

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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NETWORKS (cont.)

Encourage networking and make efforts to increase peer-to-peer or business-to-business networks	<ol style="list-style-type: none">1. How can you leverage access to external business networks?2. How can you encourage peer support after the program?	<ul style="list-style-type: none">▸ Locate existing community and business networks.▸ Provide time for leaders of local business or community networks to speak in front of the group.▸ Invite leaders of local business or community networks to serve as judges or reviewers for in-program competitions, assignments, or presentations.▸ Consider helping participants form their own network of program alumni.
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GENDER-INCLUSIVE CONSIDERATIONS WHEN EVALUATING LEARNING

The overall purpose of *Evaluating Learning* is to determine the effectiveness of the learning program and whether it met performance and business objectives. Evaluating learning can take many forms, including surveys of participant reaction, knowledge tests, skill demonstrations, comparisons of pre-learning and post-learning performance, and calculations of return on investment.

As a reminder, the main objectives of *Evaluating Learning* are to:

- Identify appropriate and realistic measures for each level of evaluation.

- Produce effective learning that is useful for participants and their organizations.
- Gain a comprehensive perspective of modifications that can improve future learning experiences.

When designing and implementing evaluation activities and materials for gender-inclusive programs or programs specifically targeted to women, it is important to consider appropriate collection methods and document and evaluate factors that have hindered and/or supported both men's and women's participation and engagement.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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Country

SOCIAL AND CULTURAL NORMS

<p>Collect gender-disaggregated data and communicate program results in a gender-inclusive and culturally appropriate manner</p>	<p>1. Do planned monitoring and evaluation methods reflect the needs of participants and enable all genders to express themselves freely?</p>	<ul style="list-style-type: none"> ▸ Collect gender-disaggregated data that can be used to inform gender analysis. ▸ Collect data in a manner that permits both men and women to express themselves freely (for example, provide opportunities for women to answer questions without interference from other members of their family, allow participants to bring a trusted friend to assist in responding to questions, and capture both results and participants' feelings about the results). ▸ Decide how to communicate longer-term program results, considering cultural and religious norms, political circumstances, and gender beliefs and behaviors.
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TECHNOLOGY

<p>Evaluate digital solutions used in the program</p>	<p>1. How effective were the program's digital learning solutions?</p>	<ul style="list-style-type: none"> ▸ Determine how access to technology, or a lack of access, supported or hindered learning.
<p>Determine viability of digital methods to collect evaluation data</p>	<p>1. What digital methods can you use to collect data?</p>	<ul style="list-style-type: none"> ▸ Consider participants' literacy and digital skill levels when designing evaluation methods. ▸ Consider how participants' access or lack of access to technology is likely to affect data collection. ▸ Plan for a mix of high-tech and low-tech data collection methods to ensure that all demographics within the program are fairly represented.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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SAFETY AND SECURITY

Identify any issues of sexual harassment that occurred in your program	1. Was there any disruptive behavior toward men and/or women participants during the program and how did it affect attendance, participation, or engagement?	▸ Document disruptive behavior towards participants when it happens and share lessons learned.
Evaluate quality of venue	1. Was the venue conducive to learning? 2. Did it feel safe and secure?	▸ Document advantages and disadvantages of chosen venues and their impact on program results and attendance.

Individual

CONFIDENCE AND LEADERSHIP

Evaluate improvements in confidence and leadership skills, if applicable	1. How can you measure impacts of training on acquisition of skills, knowledge, and personal development?	<ul style="list-style-type: none"> ▸ Ask participants if they feel their self-confidence and leadership skills increased as a result of the program and whether this had an impact on their business or work performance. Ask for evidence to support their assertions. ▸ Ask other stakeholders whether they noticed any improvement in the participants' self-confidence or leadership skills. Ask for evidence to support their assertions. ▸ Ask Measurement and Evaluation experts for advice on how to best measure changes in self-confidence and leadership skills.
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NETWORKS

Evaluate effectiveness of coaching and mentoring	1. How can you segregate the impact of training and follow-up services? 2. Can coaches and/or mentors facilitate collection of evaluation data?	<ul style="list-style-type: none"> ▸ Consider whether it is useful to isolate the effects of coaching and/or mentoring on the program. ▸ Determine whether coaches or mentors can effectively facilitate data collection without unduly influencing the results.
Evaluate effectiveness of using women role models	3. How did role models affect registration, attendance, engagement, and program completion?	▸ Document how the use of role models affected registration, attendance, active engagement in the program, and program completion.
Evaluate effectiveness of networking (peer to peer or business-to-business)	4. How can you segregate the impact of training and networking?	▸ Measure and document the effects of the program before and after networking begins.



Family

AVAILABILITY TO PARTICIPATE/CARE RESPONSIBILITIES/DECISION MAKING/AGENCY

Evaluate how women's family factors impact their ability to transfer the learning

1. Do your evaluation questions address the family challenges that women face when applying learning?

- Determine women's ability to take time away from work or household responsibilities to attend post-program support.
- Determine women's ability to make decisions regarding attending post-program support.
- Include questions on how time constraints, venue location, and childcare responsibilities affected participants' abilities to apply learning.

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- ³ International Finance Corporation. 2016. "MSME Finance Gap: Assessment of the Shortfalls and Opportunities in Financing Micro, Small and Medium Enterprises in Emerging Markets." <https://www.smefinanceforum.org/sites/default/files/Data%20Sites%20downloads/MSME%20Report.pdf>
- ⁴ Ellingrud, Kweilin, Krishnan, Mekala, and Anu Madgavkar. 2016. "Miles to Go: Stepping up Progress Toward Gender Equality," McKinsey Global Institute September 2016. Visited February 2020. <https://www.mckinsey.com/~media/mckinsey/featured%20insights/Women%20matter/Miles%20to%20go%20Stepping%20up%20progress%20toward%20gender%20equality/Miles-to-go-Stepping-up.ashx>
- ⁵ Some of the reasons for lower women's participation rate are disproportionate responsibility for childcare, lack of safe and affordable transportation, and legal barriers. "Women, Business and the Law." 2019. World Bank. <https://openknowledge.worldbank.org/bitstream/handle/10986/32639/9781464815324.pdf>
- ⁶ Post-training/program personalized, on-the-job guidance, in the form of coaching or mentoring, helps women apply what they learned in the program to their real-world situations or problems.
 - a) Coaching gives space to women to apply the knowledge gained in the program to their business case. It is usually short-term, of a set duration, structured and focused on specific developmental areas or issues to achieve specific, immediate goals.
 - b) Training which incorporates a mentoring program alongside and after classroom training shows better effects. Mentoring may occur either face-to-face or by phone.Gender Innovation Lab, Personal initiative training leads to the remarkable growth of woman-owned a small business in Togo. World Bank, Universität School. Incorporated in "An Operational Guide to Women's Entrepreneurship Programs in the World Bank." July 2018. <http://documents.worldbank.org/curated/en/629041543523635439/pdf/Operational-Guide-to-Womens-Entrepreneurship-Programs-An-Overview.pdf>
- ⁷ Why these categories?

Key influences on an individual program participant stem from one or more sources: at a macro level, the society of which the individual is a part; at a meso level, the family unit of which the individual is a part; and at a micro level, the attributes and traits of the individual.

We have clustered influencing factors into the three major categories:

 - Macro level – These are standard factors one would find in any market analysis, sometimes referred to as PESTLE (Political, Economic, Social, Technological, Legal and Environmental) factors. We have renamed the factors for purposes of this appendix and added the factors of safety and security, which can present their own challenges in some emerging markets.
 - Meso level – These are primarily factors related to women's role in family and its effect on participation in work / study outside the family. These factors have derived from meta-research by the Gender team.
 - Micro level – These are personal characteristics that influence success of an individual participant in learning and applying knowledge and skills. They will vary considerably from individual to individual. Again, they have been derived from research by the Gender team.

The factors offer a practical lens thru which to view and modify the routine tasks of a performance and learning professional working in an emerging market. Not all factors will apply to every situation; however, using the factors to screen planning, development and delivery tasks of a program can surface potential obstacles to success.- ⁸ Regardless of the per capita GDP, a strong negative and significant correlation exists between fear of failure and a woman's likelihood of starting a new business. Women are less likely to take the risk. Building self-confidence, self-efficacy, and error competency of women through training is crucial for women's success as entrepreneurs. Leadership, assertiveness, self-advocacy, and resilience are key characteristics of successful entrepreneurs. "Chile Emprendedora: Promoting Women in Dynamic Business," Claudia Piras, Lead Social Development Economist, Gender and Diversity Unit Inter-American Development Bank, April 6, 2011.
- ⁹ Peer-to-peer learning is a critical component of sustainability and growth results for entrepreneurs. IFC observation.
- ¹⁰ Klugman, Jeni, Hanmer, Lucia, Twigg, Sarah, Hasan, Tazeen, McCleary-Sills, Jennifer, and Julieth Santamaria. 2014. "Voice and Agency: Empowering Women and Girls for Shared Prosperity." World Bank Group, Washington, DC. Available at: <https://www.worldbank.org/en/topic/gender/publication/voice-and-agency-empowering-women-and-girls-for-shared-prosperity>
- ¹¹ Post-training/program, personalized, on-the-job guidance in the form of coaching or mentoring to help women apply what they learned in the program to their real-world situations or problems.
 - a) Coaching gives space to women to apply the knowledge gained in the program to their business case. It is usually short term, of a set duration, structured and focused on specific developmental areas or issues to achieve specific, immediate goals.
 - b) Training which incorporates a mentoring program alongside and after classroom training shows better effects. Mentoring may occur either face-to-face or by phone.Gender Innovation Lab, Personal initiative training leads to the remarkable growth of Woman-owned a small business in Togo. World Bank, Universität School. Incorporated in "An Operational Guide to Women's Entrepreneurship Programs in the World



Bank,” July 2018. <http://documents.worldbank.org/curated/en/629041543523635439/pdf/Operational-Guide-to-Womens-Entrepreneurship-Programs-An-Overview.pdf>

- ¹² Gender equality is not only a social and moral imperative, but also an economic necessity. Across the world, countries are losing \$160 trillion in wealth because of differences in lifetime earnings between women and men, according to a recent World Bank Group study. Companies, however, are increasingly realizing that they can gain greater competitive advantage and improve profits by targeting women as employees, entrepreneurs, consumers, and business leaders. IFC has long taken a comprehensive approach to reduce gender inequality by creating partnerships to encourage hiring of women and improving their working conditions, help expand access to financial services for women, investing in innovative technologies that expand choices of female consumers and working with partners to provide business skills and leadership training to women entrepreneurs. For more information please visit: https://www.ifc.org/wps/wcm/connect/Topics_Ext_Content/IFC_External_Corporate_Site/Gender+at+IFC/
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- ¹⁴ In the case of the Bank of Palestine, there was a tendency among participants to attend online rather than in person. While the online sessions tended to be less engaging, training was still possible in the case where access was limited. 2017. “Evaluation Report. Bank of Palestine Strengthens Women-Owned Businesses and the Economy.” International Finance Corporation, Washington, DC. https://www.ifc.org/wps/wcm/connect/85ab284b-12a5-4345-ad8b-4a41131cf0d9/Bank_of_Palestine_Eval_Report_FINAL.pdf?MOD=AJPERES&CVID=m6mdDM1
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- ¹⁶ As an example, a World Bank study in West Bank and Gaza found that geographic and social restrictions limit women’s ability to move outside of their local communities, reducing business growth opportunities for women even more so than for men. World Bank feature story, March 31, 2011. “Mobility Restrictions and Labor Market Dynamics in Conflict-Affected West Bank and Gaza.” Available at: <https://www.worldbank.org/en/news/feature/2011/03/31/mobility-restrictions-and-labor-market-dynamics-in-conflict-affected-west-bank-and-gaza>
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- ¹⁹ International Finance Corporation. 2017. “Evaluation Report. Bank of Palestine Strengthens Women-Owned Businesses and the Economy.” https://www.ifc.org/wps/wcm/connect/85ab284b-12a5-4345-ad8b-4a41131cf0d9/Bank_of_Palestine_Eval_Report_FINAL.pdf?MOD=AJPERES&CVID=m6mdDM1
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- ²¹ Stipends can have tradeoffs. While they may allow the poorest to participate, they can also create adverse incentive. Some participants might be more motivated by the money rather than the project goals. Adolescent Girls Initiative. A Resource Guide. Design. Promoting young women’s inclusion. Available at: https://www.s4ye.org/agi/html/Project_Design_Promoting_Young_Womens_Inclusion.html
- ²² Access to good quality, affordable childcare is a win-win situation for all. It improves physical and cognitive outcomes for children, enhances employment opportunities for women, boosts productivity and profits for businesses, and supports socio-economic growth. International Finance Corporation. 2019. “Tackling Childcare: A guide for employer-supported childcare.” https://www.ifc.org/wps/wcm/connect/topics_ext_content/ifc_external_corporate_site/gender+at+ifc/resources/guide+for+employer-supported+childcare
- ²³ Responsibility for the care of other family members often falls on the women in families. In particular, mothers are frequently the primary caregivers for children. You should be aware of the age of parenthood in the country where your project is offered, as well as available childcare services for female participants. The need to care for a child might constrain a woman’s ability to attend or participate in training; the benefit of providing childcare services which would allow her to focus on the acquisition of new skills and knowledge may outweigh the cost which is often minimal. For example, according to the Adolescent Girls Initiative, childcare can be included in skills training projects at a relatively low cost. For instance, the monthly per student cost was less than \$5 in a project the Adolescent Girls Initiative managed in Liberia. Depending on the project context, childcare can be an affordable project component and well worth the cost when trying to reach vulnerable young women. Adolescent Girls Initiative. A Resource Guide. Design. Promoting young women’s inclusion. Available at: https://www.s4ye.org/agi/html/Project_Design_Promoting_Young_Womens_Inclusion.html
- ²⁴ 54 per cent of women in low- and middle-income countries now use mobile internet and the gender gap is narrowing. Women are 20 per cent less likely to use mobile internet than men, down from 27 per cent in 2017. This reduction was driven primarily by an improvement in South Asia where the gap narrowed by 16 percentage points. Despite this progress, the gender gap in



- mobile internet use in low- and middle-income countries remains substantial, with over 300 million fewer women than men accessing the internet on a mobile. The gender gap is still widest in South Asia at 51 per cent, and remains fairly consistent in other regions such as Sub-Saharan Africa, which has the second largest gender gap at 37 per cent. The underlying gender gap in mobile ownership remains largely unchanged, with the remaining unconnected proving difficult to reach. Women across low- and middle-income countries are eight per cent less likely than men to own a mobile phone, which translates into 165 million fewer women than men owning a mobile. GSMA, 2020, "The Mobile Gender Gap Report 2020". <https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2020/02/GSMA-The-Mobile-Gender-Gap-Report-2020.pdf>
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- ²⁶ Clarity about how your program participants function in day-to-day life enables you to make more informed decisions regarding the conception and implementation of a training program and align it more realistically with program participants training preferences and personal goals for the future. World Development Report 2012, Gender Equality and Development, The World Bank, Washington, DC
- ²⁷ IFC Observation.
- ²⁸ Depending on the cultural context, the gender of the facilitator may be critical to the success of the training delivery.
- ²⁹ Women, Business and the Law. 2019. International Bank for Reconstruction and Development, The World Bank, Washington, DC. <https://wbl.worldbank.org/>
- ³⁰ Women across low- and middle-income countries are 20 per cent less likely to use mobile internet than men, which translates to over 300 million fewer women than men accessing the internet on a mobile. Women across low- and middle-income countries are also eight per cent less likely than men to own a mobile phone, which translates into 165 million fewer women than men owning a mobile. GSMA, 2020, "The Mobile Gender Gap Report 2020". <https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2020/02/GSMA-The-Mobile-Gender-Gap-Report-2020.pdf>
- ³¹ Ibid.
- ³² Appropriate use of new technology can enable participants with travel limitations to participate in the program and post-program activities. International Finance Corporation. 2017. "Evaluation Report. Bank of Palestine Strengthens Women-Owned Businesses and the Economy." https://www.ifc.org/wps/wcm/connect/85ab284b-12a5-4345-ad8b-4a41131cf0d9/Bank_of_Palestine_Eval_Report_FINAL.pdf?MOD=AJPERES&CVID=m6mdDM1
- ³³ As an example, a World Bank study in West Bank and Gaza found that geographic and social restrictions limit women's ability to move outside of their local communities, reducing business growth opportunities for women even more so than for men. World Bank. March 31, 2011. "Mobility Restrictions and Labor Market Dynamics in Conflict-Affected West Bank and Gaza." Available at: <https://www.worldbank.org/en/news/feature/2011/03/31/mobility-restrictions-and-labor-market-dynamics-in-conflict-affected-west-bank-and-gaza>
- ³⁴ Globally, women have lower confidence levels in their abilities as entrepreneurs than their male counterparts. "Global Entrepreneurship Monitor 2016/17 Women's Report." <https://www.babson.edu/media/babson/site-assets/content-assets/images/news/announcements/GEM-2016-2017-Womens-Report.pdf>, visited February 12, 2020.
- ³⁵ Regardless of the per capita GDP, a strong negative and significant correlation exists between fear of failure and a woman's likelihood of starting a new business. Women are less likely to take the risk. Building self-confidence, self-efficacy, and error competency of women through training is crucial for women's success as entrepreneurs. Leadership, assertiveness, self-advocacy and resilience are key characteristics of successful entrepreneurs. "Chile Emprendedora: Promoting Women in Dynamic Business." Claudia Piras, Lead Social Development Economist, Gender and Diversity Unit Inter-American Development Bank, April 6, 2011.
- ³⁶ Personal initiative training has demonstrated impact on business growth more so than solely business management training (increase profits by 40 percent, compared to the control group and 5 percent impact for traditional business training). Personal Initiative Training increased error competence (ability to recover from errors). Gender Innovation Lab, Personal initiative training leads to the remarkable growth of a woman-owned small business in Togo. World Bank, Universität School. Incorporated in "An Operational Guide to Women's Entrepreneurship Programs in the World Bank," July 2018. <http://documents.worldbank.org/curated/en/629041543523635439/pdf/Operational-Guide-to-Womens-Entrepreneurship-Programs-An-Overview.pdf>
- ³⁷ Spousal recognition plays a critical role. The presence of husbands in programs aimed at women may improve knowledge dissemination. The presence of men during the training may change the nature and depth of the discussions during the training since men bring their own expertise and experience to the event. Also, if a woman's husband attends the training, they may discuss the content of the training at home. Gender and business training may also reduce intra-household conflicts, such as relational oppression. Thus, women become more actively involved in important household and business decisions. "The impact of gender and business training for female microfinance clients in Vietnam," unpublished. 2014. <https://pdfs.semanticscholar.org/e3b4/5318of944417a6ebd367b13a47e5690a1911.pdf>
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- ³⁹ In the Bank of Palestine case the women were recognized individually during a high-profile graduation ceremony by the CEO of the Bank of Palestine, IFC's Country Representative, and government officials. During the ceremony, the participants had to present their business models and received a certificate for their participation, as well as recognition from important people in the

local community. These activities, which helped build the women's confidence and their sense of leadership, will continue in the future. International Finance Corporation. 2017. "Evaluation Report. Bank of Palestine Strengthens Women-Owned Businesses and the Economy." https://www.ifc.org/wps/wcm/connect/85ab284b-12a5-4345-ad8b-4a41131cf0d9/Bank_of_Palestine_Eval_Report_FINAL.pdf?MOD=AJPERES&CVID=m6mdDM1

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- ⁴² Leadership, assertiveness, self-advocacy and resilience are key characteristics of successful entrepreneurs. <https://www.worldbank.org/en/news/feature/2018/01/18/new-mindset-increased-profits-lessons-from-an-innovative-entrepreneurial-training-in-togo>
- ⁴³ Women tend to lack in problem-solving skills, crucial in the role as entrepreneurs. Practical training with a focus on sectors in which women are active can help develop problem-solving and critical thinking skills. IFC observation.
- ⁴⁴ Lack of supportive role models in the family can inhibit the women to take the training. Dr Ute Stephan. 2011. "Culture's Consequences for Entrepreneurship: Recent Findings and Future Directions," University of Sheffield, Institute of Work Psychology & Centre for Regional Economic and Enterprise Development. https://www.uis.no/getfile.php/1352966/Forskning/Senter%20for%20Innovasjonsforskning/Stephan_culture-eship_Stava_o8122011%20%282%29.pdf
- ⁴⁵ Peer-to-peer learning is a critical component of sustainability and growth results for entrepreneurs. IFC observation.
- ⁴⁶ The presence of peers may influence a woman's classroom experience. She may exhibit greater business confidence in a more supportive environment or may feel more competitive pressure when among peers to absorb the material covered. Equally, having a friend as a learning partner may strengthen the social network that a woman relies on for support after the training is over. This support could include financial assistance, information, or even ongoing encouragement to strive to attain business goals. As an example, in an IDB case study in Peru, women were invited to join the training with a friend, in the evaluation process (four months after the training) the participants report differences in business behavior, including a higher volume of business and more stated business plans to increase revenues. Furthermore, the participants reported significantly higher household income and expenditures and are less likely to report their occupation as "housewife."
- ⁴⁷ Access to startup capital increases women productivity; however, women-owned businesses usually experience a greater limited access to finance than men. It is therefore important that training for women should be offered alongside access to finance opportunities. Sara Johansson de Silva, Pierella Paci, and Josefina Posadas. 2014. "Lessons Learned and Not Yet Learned from a Multi-country Initiative on Women's Economic Empowerment," World Bank studies, Washington, DC.
- ⁴⁸ For example, training delivered provided as a complement to microloans. "The Impact of Gender and Business Training for Female Microfinance Clients in Vietnam," unpublished. 2014.
- ⁴⁹ The need to care for a child might constrain a woman's ability to attend or participate in a program. The benefit of providing childcare services that would allow her to focus on the acquisition of new skills and knowledge may outweigh the costs which is often minimal. For example, according to the Adolescent Girls Initiative, childcare can be included in skills training projects at a relatively low cost. For instance, the monthly per student cost was less than the \$5 in a project AGI managed in Liberia. Depending on the project context, childcare can be an affordable project component and well worth the cost when trying to reach vulnerable young women. Adolescent Girls Initiative. A Resource Guide. Design. Promoting young women's inclusion. Available at: https://www.s4ye.org/agi/html/Project_Design_Promoting_Young_Womens_Inclusion.html
- ⁵⁰ International Finance Corporation. 2019. "Tackling Childcare: A guide for employer-supported childcare." https://www.ifc.org/wps/wcm/connect/topics_ext_content/ifc_external_corporate_site/gender+at+ifc/resources/guide+for+employer-supported+childcare
- ⁵¹ Klugman, Jeni, Hanmer, Lucia, Twigg, Sarah, Hasan, Tazeen, McCleary-Sills, Jennifer, and Julieth Santamaria. 2014. "Voice and Agency: Empowering Women and Girls for Shared Prosperity." World Bank Group, Washington, DC. Available at: <https://www.worldbank.org/en/topic/gender/publication/voice-and-agency-empowering-women-and-girls-for-shared-prosperity>
- ⁵² It has been shown that women tend to have lower levels of confidence. Programs that seek to be gender-inclusive may need to incorporate more activities on building confidence to achieve similar levels of effectiveness among men and women.
- ⁵³ Personal Initiative Training is one approach to develop self-advocacy, resilience, self-confidence, and risk taking. Personal initiative training has demonstrated impact on business growth more so than solely business management training (increase profits by 40 percent, compared to the control group and 5 percent impact for traditional business training. Personal Initiative Training increased error competence (ability to recover from errors). "Gender Innovation Lab, Personal initiative training Leads to the remarkable growth of a woman-owned small business in Togo." World Bank, Universität School. Incorporated in "An Operational Guide to Women's Entrepreneurship Programs in the World Bank," July 2018. <http://documents.worldbank.org/curated/en/629041543523635439/pdf/Operational-Guide-to-Womens-Entrepreneurship-Programs-An-Overview.pdf>
- ⁵⁴ A socially supportive culture relates positively to entrepreneurship. As an example, Russian and Chinese business owners have more entrepreneurs in their families and among childhood friends than otherwise similar individuals, suggesting that social environment also matters (World Bank 2012c). IFC (International Finance Corporation). 2017. "Evaluation Report. Bank of Palestine Strengthens Women-Owned Businesses and the Economy." https://www.ifc.org/wps/wcm/connect/85ab284b-12a5-4345-ad8b-4a41131cf0d9/Bank_of_Palestine_Eval_Report_FINAL.pdf?MOD=AJPERES&CVID=m6mdDM1
- ⁵⁵ Networks support women's growth in a variety of ways: exchanging knowledge between different age groups, successful storytelling, knowledge sharing, and resolving the challenges. Sadeq, Tareq, Muhannad Hummed, and Steven Glover. 2011. "Policies to Promote Female Entrepreneurship in the Palestinian Territory." Jerusalem: MAS (Palestine Economic Policy Research Institute). Available at: <https://library.palestineconomy.ps/public/files/server/2015220112434-1.pdf>
- ⁵⁶ Engaging men in another way to support the confidence building process. If men understand the basis of the program, they may become more supportive of women attending the program. IFC observation.

- ⁵⁷ For example, this IFC project in Gaza and West Bank included “gender awareness workshops” for trainers, including training and facilitation strategies to specifically support female entrepreneurs. IFC (International Finance Corporation). 2017. “Evaluation Report. Bank of Palestine Strengthens Women-Owned Businesses and the Economy.” https://www.ifc.org/wps/wcm/connect/85ab284b-12a5-4345-ad8b-4a41131cf0d9/Bank_of_Palestine_Eval_Report_FINAL.pdf?MOD=AJPERES&CVID=m6mdDM1
- ⁵⁸ Personal Initiative Training is one approach to develop self-advocacy, resilience, self-confidence, and risk taking. Personal Initiative Training has demonstrated impact on business growth more so than solely business management training (increase profits by 40 percent, compared to the control group and 5 percent impact for traditional business training. Personal Initiative Training increased error competence (ability to recover from errors). Gender Innovation Lab, Personal initiative training Leads to the remarkable growth of a woman-owned small business in Togo. World Bank, Universität School. Incorporated in “An Operational Guide to Women’s Entrepreneurship Programs in the World Bank,” July 2018. <http://documents.worldbank.org/curated/en/629041543523635439/pdf/Operational-Guide-to-Womens-Entrepreneurship-Programs-An-Overview.pdf>
- ⁵⁹ Simel Esim. 2001 “See How They Grow: Business Development Services for Women’s Business Growth,” International Center for Woman Research. Available at: <https://www.icrw.org/wp-content/uploads/2016/10/See-How-they-Grow-Business-Development-Services-for-Womens-Business-Growth.pdf>
- ⁶⁰ An IFC project in West Bank and Gaza with Bank of Palestine found out that leadership training is more effective when embedded throughout the training instead of conducting stand-alone sessions. Leadership sessions that take the form of coaching, one-on-one interaction, and guest speaker sessions were the most inspiring for the women. Female participants reported that they preferred female leaders (e.g., as speakers) whose experiences and backgrounds resonated with them. IFC (International Finance Corporation). 2017. “Evaluation Report. Bank of Palestine Strengthens Women-Owned Businesses and the Economy.” https://www.ifc.org/wps/wcm/connect/85ab284b-12a5-4345-ad8b-4a41131cf0d9/Bank_of_Palestine_Eval_Report_FINAL.pdf?MOD=AJPERES&CVID=m6mdDM1
- ⁶¹ IDA has been working to expand girls’ access to education, but 31 million girls are still out of school. This difference in basic education can become a barrier throughout women’s lives.
- ⁶² The availability of women role models to participants need to be diagnosed and considered when designing training. For example, lack of supportive role models in the family can inhibit the women to take the training. Dr Ute Stephan. 2011. “Culture’s Consequences for Entrepreneurship: Recent Findings and Future Directions,” University of Sheffield, Institute of Work Psychology & Centre for Regional Economic and Enterprise Development. https://www.uis.no/getfile.php/1352966/Forskning/Senter%20for%20Innovasjonsforskning/Stephan_culture-eship_Stava_o8122011%20%28%29.pdf
- ⁶³ A socially supportive culture relates positively to entrepreneurship. As an example, Russian and Chinese business owners have more entrepreneurs in their families and among childhood friends than otherwise similar individuals, suggesting that social environment also matters (World Bank 2012c). Many female participants prefer female leaders (speakers) whose entrepreneurial experiences and backgrounds resonate with their own. IFC (International Finance Corporation). 2017. “Evaluation Report. Bank of Palestine Strengthens Women-Owned Businesses and the Economy.” https://www.ifc.org/wps/wcm/connect/85ab284b-12a5-4345-ad8b-4a41131cf0d9/Bank_of_Palestine_Eval_Report_FINAL.pdf?MOD=AJPERES&CVID=m6mdDM1
- ⁶⁴ Many female participants prefer female leaders (speakers) whose entrepreneurial experiences and backgrounds resonate with their own. A socially supportive culture relates positively to entrepreneurship. As an example, Russian and Chinese business owners have more entrepreneurs in their families and among childhood friends than otherwise similar individuals, suggesting that social environment also matters. IFC (International Finance Corporation). 2017. “Evaluation Report. Bank of Palestine Strengthens Women-Owned Businesses and the Economy.” https://www.ifc.org/wps/wcm/connect/85ab284b-12a5-4345-ad8b-4a41131cf0d9/Bank_of_Palestine_Eval_Report_FINAL.pdf?MOD=AJPERES&CVID=m6mdDM1
- ⁶⁵ For example, this IFC project in Gaza and West Bank included “gender awareness workshops” for trainers, including training and facilitation strategies to specifically support female entrepreneurs. IFC (International Finance Corporation). 2017. “Evaluation Report. Bank of Palestine Strengthens Women-Owned Businesses and the Economy.” https://www.ifc.org/wps/wcm/connect/85ab284b-12a5-4345-ad8b-4a41131cf0d9/Bank_of_Palestine_Eval_Report_FINAL.pdf?MOD=AJPERES&CVID=m6mdDM1
- ⁶⁶ Training that includes soft skills, including social support and confidence building, is more effective, especially for women with lower self-efficacy, and should be a core element of high-quality training programs. Training with peers or group-based training can provide social support and boost self-confidence. Mayra Buvinic and Megan O’Donnell. 2019 Center for Global Development Blog: Women’s Economic Empowerment: Some Tips for Informed Investments. August 26. <https://www.cgdev.org/blog/womens-economic-empowerment-some-tips-informed-investments>
- ⁶⁷ International Finance Corporation and the DaNa Facility, 2019. “Respectful Workplaces: Exploring the Costs of Bullying and Sexual Harassment to Businesses in Myanmar”, https://www.ifc.org/wps/wcm/connect/region__ext_content/ifc_external_corporate_site/east+asia+and+the+pacific/resources/respectful+workplaces-myanmar
- ⁶⁸ Kelley, Donna, Candida Brush, Patricia Greene, Mike Herrington, Abdul Ali, and Penny Kew. 2015. Special Report: Women’s Entrepreneurship 2015. Global Entrepreneurship Monitor (GEM). Available at: <http://www.babson.edu/Academics/centers/blank-center/global-research/gem/Documents/GEM%202015%20Womens%20Report.pdf>
- ⁶⁹ Training that includes soft skills, including social support and confidence building, is more effective, especially for women with lower self-efficacy, and should be a core element of high-quality training programs. Training with peers or group-based training can provide social support and boost self-confidence. Mayra Buvinic and Megan O’Donnell. 2019. Center for Global Development Blog: Women’s Economic Empowerment: Some Tips for Informed Investments, August 26, 2019. <https://www.cgdev.org/blog/womens-economic-empowerment-some-tips-informed-investments>
- ⁷⁰ Chile Emprendedoras: Promoting Women in Dynamic Business, Claudia Piras, Lead Social Development Economist, Gender and Diversity Unit, Inter-American Development Bank, April 6, 2011.



CONSIDERATIONS FOR PROGRAMS IN FRAGILE AND CONFLICT-AFFECTED SITUATIONS



INTRODUCTION

Why focus on performance and learning programs in FCS?

Across the world, more than 130 million people are living in situations of fragility, conflict, and violence. By 2030, it is estimated that 2/3 of the world's extreme poor will be living in FCS¹. No country—developed or developing—is immune to the impact of this global challenge, which threatens efforts to end extreme poverty, hurts economic growth, and forcibly displaces increasing numbers of people.

Now more than ever, training professionals have a key role to play in tackling this critical development issue. By designing and delivering effective, high-quality, training programs tailored to local needs in FCS, training professionals equip people, companies, and communities with the skills and knowledge needed to address the complex array of factors fueling fragility, conflict and violence.

The importance of SME training in FCS

By supporting economic growth, promoting local employment and income-earning opportunities, generating government revenues, and delivering goods and services, the private sector is central to breaking free of the “fragility trap.” In FCS, small and medium-size enterprises (SMEs) provide a lifeline for jobs creation and economic growth. During conflict and natural disasters, SMEs are often the last businesses standing, providing essential goods and services to vulnerable populations. SMEs are also key clients and points-of entry for development organizations, such as IFC, and training professionals whose skills development programs enable businesses, entrepreneurs, and employees to grow their local economies and promote stability.

The importance of gender-inclusive training in FCS

The inequalities between men and women tend to be magnified in FCS, where regressive gender norms and increased risk of violence are combined with a lack of access to health, education, and employment. As the share of women-headed households increases during violence and conflict, promoting learning and economic opportunities for women becomes even more important. Because they merit special attention, gender-inclusive considerations are addressed separately in the Gender Supplement and throughout the seven competencies presented in the Guide to Training.

Additional risks for FCS training programs

Conducting training programs in FCS often comes with higher risks. These include security risks and physical threats for program providers and participants, especially participants who belong to vulnerable or marginalized groups. Weak or nonexistent institutional capacity, environmental, social, and corporate governance (ESG) risks, as well as fraud, corruption and other fiduciary and legal risks can all negatively affect the implementation and impact of training programs. A lack of services and infrastructure may also add to planning complexity, with more time and effort needed to organize logistics and prepare participants for training.

Fragility, conflict and violence can also have long-term psychological consequences. While many capacity building projects in emerging markets provide ancillary supports, such as access to finance programs or small business incubators, building resilience and self-confidence is also crucial in FCS. A recent study by the World Bank revealed that SME entrepreneurs in conflict-affected areas of Pakistan found stress mitigation highly relevant for themselves and their employees.²



Training professionals and performance improvement programs need to respond flexibly to local contexts and be resilient in times of crisis. Proactive risk management is vital, combined with targeted and rapid support when risks do materialize.

How to use this supplement

This supplement provides additional information about how to apply the considerations and tasks presented in the Guide for Training in FCS. Sample questions and evidence-based tips and approaches are based on international best practices and lessons learned. While not exhaustive, these considerations can help guide program design, development, and implementation. End notes provide additional explanation, examples, and resources.

How are the FCS considerations structured?

Participants must be the central focus of any performance and learning program. If participants' needs are not properly addressed, they will not fully absorb and apply the concepts taught during training.³ Many factors impact participants' needs, but there are two broad categories of considerations:

- **Country:** The influence of community, social mores, gender perceptions, political events or affiliations, religious beliefs, economic stability, laws, policies, infrastructure, available technology, and collective safety on the development, implementation, and results of a performance improvement program.
- **Individual:** The effect that personal factors, characteristics, personality, knowledge, skills, ability, outlooks, and formal and informal networks, have on a participant's ability to actively participate in a program and to learn and use what the program teaches.

For each category, you will find considerations, tasks, key questions, tips, and approaches for conducting training programs in FCS. They supplement the competencies, supporting competencies, and tasks found in the main competency framework of the Guide to Training document. It is vital that all these factors are considered during the needs assessment and design phases, not only during delivery, as decisions made at an early stage may have significant implications later.

The competencies are grouped into the seven phases typically found in any training project lifecycle. These include *Assessing Performance Needs*, *Designing Curricula*, *Designing Learning Experiences*, *Facilitating Learning*, *Supporting the Transfer of Learning*, and *Evaluating Learning*. Throughout the project phases, it is critical to maintain a strong relationship with clients. That's why *Partnering with Clients* is positioned at the center of the project lifecycle, touching all other phases.



FIGURE 1: The competency wheel

TABLE 1: Definitions of each consideration category for training programs in FCS

CONSIDERATIONS	KEY FACTORS	DEFINITION
Country External factors may influence development, implementation, and results of a performance improvement program. While these tend to be outside a training professional's direct control, they may still need to be addressed or considered in the design, implementation, and evaluation of learning programs.	Security and safety	Protection from factors related to political conflict, terrorism, violence, gender-based violence, and sexual harassment, or collective post-conflict trauma for participants, program providers, and all those affiliated with the program.
	Social and cultural norms	Local sensitivities such as traditions and cultural norms, religious beliefs and practices, and conflicts associated with socially imposed identity roles (for example gender, racial, tribal, religious, class, and political affiliation).
	Economic stability	Strength, sophistication, and openness of the market (state-owned versus private sector), level of employment and potential for business opportunities. Economic conditions and existing regional development programs or stimulus packages could affect the amount of funding available for learning programs or the fees that these programs could charge to participants.
	Legal environment	Local laws, regulations, rules, and policies.
	Technology	Accessibility, availability, and reliability of information and communication technology at the program location.
Individual Personal factors, characteristics and circumstances of participants in a performance improvement program. A training professional may be able to influence several of these factors.	Infrastructure and logistics	Accessibility, availability, and reliability of venues and services (for example, utilities, sanitation, transport, catering and accommodation) at the program location.
	Confidence	An individual's level of confidence including self-confidence, self-efficacy and error competency and its effect on the individual's ability to learn, apply and demonstrate knowledge and skills. <i>Self-confidence</i> is the feeling of trust in one's abilities, qualities and judgment. Confidence is a skill that can be developed. <i>Self-efficacy</i> is the belief that one can succeed or accomplish a task. <i>Error competency</i> is the ability to recover from errors.
	Resilience	An individual's state of psychological well-being, ability to function in challenging and stressful circumstances, persevere, and overcome adversity and aspirational barriers (from responding to conflicts associated with a socially imposed role to dealing with effects of trauma stemming from violence or political unrest).
	Education and skills	An individual's current level of knowledge, skills, and abilities in a given subject.
	Networks	An individual's formal or informal relationships with peers, mentors, coaches, business links, etc., that complement or support sustained performance before, during, and after a program. ⁴



FCS CONSIDERATIONS WHEN PARTNERING WITH CLIENTS

Throughout a project’s entirety, maintaining a strong relationship with the client is critical for success. That is why Partnering with Clients lies at the center of the competency wheel, touching all phases of the project cycle. In this section, we advise you on steps to take and issues to consider as you work with your client to implement the different phases. We group these tasks and considerations into factors that are unique to emerging markets and FCS; we do not intend to imply a sequential order. The tasks and considerations selected aim to expand the way the client thinks about training programs in fragile and conflict-affected situations. For a fuller picture of the overall sequential tasks this competency entails please refer to the main Guide to Training.

As a reminder, the main objectives of Partnering with Clients are:

- Get the input you need to achieve or exceed expectations on an assignment.
- Expand the way you and your clients think about effective and innovative solutions.

- Meet the needs of both the participant and the organization sponsoring the project.
- Minimize misunderstandings, surprises, or disappointments.
- Build commitment to implement solutions.
- Complete projects on time and within budget.
- Maintain client satisfaction throughout the project.

When Partnering with Clients to design and deliver programs in FCS, it is important to understand the client’s commitment and capacity to support the program in a fragile, unpredictable environment. Discuss with the client security and safety precautions for participants and program providers, and agree on venues, travel requirements, and emergency contacts. Make sure the contract clearly sets provisions and terms for program cancelation, delays, and evacuation. Agree on monetary transactions as well as who is responsible for providing the necessary equipment for the program.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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Country

SECURITY AND SAFETY		
Discuss safety of participants and providers	Political environment 1. What security arrangements need to be put in place? 2. Who is the client contact point responsible for managing safety/security issues?	<ul style="list-style-type: none"> ▸ Confer with client on any recent political or social developments that may affect the proposed program. ▸ Throughout all program phases, stay up to date on the security situation via travel advisories from consulates, embassies, or other sources. ▸ Be aware of active conflict areas or other potential hazards in or near the program location. ▸ Confirm with client who from their organization is responsible for security and safety.



CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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SECURITY AND SAFETY (cont.)

<p>Discuss safety of participants and providers (cont.)</p>	<p>Travel</p>	
	<p>3. What travel and operational approvals are required?</p>	<ul style="list-style-type: none"> ▸ Ensure participants, trainers, and other program providers obtain appropriate visas, permits, and clearances (well in advance whenever possible).
	<p>4. Are travel restrictions in place?</p>	<ul style="list-style-type: none"> ▸ Carry permits and visas at all times. ▸ Consider the feasibility of offering the program out-of-country for participants (travel costs, safety, family obligations, visa restrictions etc. For example, inviting Afghan participants to a program in Pakistan).
	<p>Venue and Transport</p>	
	<p>5. Are security escorts required for travel?</p>	<ul style="list-style-type: none"> ▸ Identify venues that participants and service providers can safely and easily travel to and from.
	<p>6. Which venues in the area are considered safe or lowest risk?</p>	<ul style="list-style-type: none"> ▸ Ask your client, organization, embassy, consulate or another trusted, locally-operating organization for a list of recommended venues with training/meeting rooms for hire. ▸ If no formal training center exists, choose a neutral and safe venue that is acceptable to all parties (for example, a farmer field, a school or a community center). ▸ In countries that have experienced recent terrorist attacks, avoid venues that are commonly targeted (such as international hotels or government buildings). ▸ Hire professional transport or security escorts for program participants or providers, where necessary. Ask your client, organization, embassy, consulate, or another trusted, locally-operating organization for a list of recommended companies. ▸ Find and follow safe travel routes. ▸ Identify an alternative venue in case there is a need to relocate.
<p>Insurance and Emergency Services</p>		
<p>7. What support services can respond to an emergency?</p>	<ul style="list-style-type: none"> ▸ Compile a list of local health centers or hospitals, their addresses, and capabilities. ▸ Obtain travel/health/evacuation insurance for yourself (and other program providers especially if these providers are from a different country). ▸ Register the program’s location and travel plans with the consulate or embassy of the client and of the program providers (if using providers from a different country). 	
<p>Distance Delivery</p>		
<p>8. Do you need alternative program delivery options?</p>	<ul style="list-style-type: none"> ▸ Determine whether an online or distance delivery session is feasible, if a physical presence is not advisable. 	

ECONOMIC STABILITY

<p>Determine client’s commitment and capacity to support the program in an FCS setting</p>	<ol style="list-style-type: none"> 1. What key benefits will the client/sponsor experience from offering a performance improvement program? 2. What benefits can participants of the performance improvement program expect? 3. What is the expected impact/benefit for the wider community? 4. What factors might interfere with your client’s ability or willingness to commit? 	<ul style="list-style-type: none"> ▸ Develop a projected ROI for the client/sponsor. ▸ Identify receptive clients or sponsors in the region (for example, financial institutions). ▸ Assess potential risks of conducting the program in the proposed location and discuss mitigations with your client.
<p>Determine the most appropriate methods for monetary transactions</p>	<ol style="list-style-type: none"> 1. What arrangements are needed to secure monetary transactions for program providers and participants? 	<ul style="list-style-type: none"> ▸ Identify viable payment methods for accommodation and program venues. ▸ Research currency exchange regulations, banking protocols, and availability and cost of exchange services if using foreign providers. ▸ Enquire about anti-terror and anti-crime regulations that might limit money transfers to countries experiencing crisis. ▸ Determine access to, and compatibility with, electronic payment systems.
<p>Determine the appropriateness of monetary incentives for participants</p>	<ol style="list-style-type: none"> 1. What supports (for example, stipends, meals, transportation) may be necessary to encourage participants? 2. Would participants be attracted to the program because of the supports rather than for the learning opportunities? 	<ul style="list-style-type: none"> ▸ Try to use non-financial supports valued by program participants (for example, provision of meals during training, provision of transportation to and from training venues).⁵ ▸ If offering stipends, administer them regularly and deliver them through a transparent mechanism.⁶

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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LEGAL ENVIRONMENT

Confirm contract terms and conditions	<ol style="list-style-type: none"> 1. Do clients/sponsors have a standard contract for program providers? 2. Is the contract suitable for FCS? 	<ul style="list-style-type: none"> ▸ Working with your program sponsor, establish a contractual template for use in FCS, including cancellation policies and payment methods (with scope for customization). ▸ Confirm that the cancellation, delay, and evacuation clauses in the contract include allowances for political or social upheaval before or during the training and that the terms and conditions are reasonable, given the realities in the area and identify clear lines of responsibility.
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INFRASTRUCTURE AND LOGISTICS

Discuss catering/venue/equipment requirements	<ol style="list-style-type: none"> 1. Are food and drinks provided during the program? 2. Is the venue heated/air-conditioned? 3. Who will provide necessary equipment at the program venue? 	<ul style="list-style-type: none"> ▸ Confirm with client who is responsible for the provision of catering (if applicable). ▸ Confirm with client the venue's amenities (for example, water, heating and air-conditioning). ▸ Be clear and confirm in writing who provides what. Do not assume that flip charts, pens, and markers are available or can be purchased in the local market.
Discuss communications requirements	<ol style="list-style-type: none"> 1. What are the appropriate/available channels for communicating with participants? 	<ul style="list-style-type: none"> ▸ Agree with client on appropriate communications channels for the program (for example, email, WhatsApp for RSVPs, signup).

Individual

CONFIDENCE/RESILIENCE

Determine need to support participants psycho-emotional needs and build their resilience	<ol style="list-style-type: none"> 1. What is the client's understanding of participants' psycho-emotional state? 2. What are the client's expectations about programs that build participants' resilience? 3. How can you educate your clients on the psycho-emotional challenges that participants face in FCS? 	<ul style="list-style-type: none"> ▸ Educate yourself on the long-term psychological consequences of conflict. ▸ Assess the client's awareness of how psychological wellbeing impedes business performance. ▸ Communicate to the client how accommodating the emotional and psychological needs of participants, as part of the program, may have a positive impact on program results and business performance.
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FCS CONSIDERATIONS WHEN ASSESSING PERFORMANCE NEEDS



Time and resources needed to properly assess performance can vary greatly. You may need to spend a few hours clarifying what participants should be able to do after a learning experience. Or you may need to conduct an in-depth needs assessment and determine a training strategy for a complex performance issue that involves many work processes, functions, and roles.

As a reminder, the main objectives of Assessing Performance Needs are:

- Have facts that support assumptions.
- Address the right problems and causes.
- Avoid rushing into a learning solution.
- Identify the best solution or blend of solutions.
- Determine how to evaluate results.

Carefully assessing participants' needs is an essential precursor to behavioral change. For FCS, a thorough

analysis of the local political, social, economic, and safety situation is vital to determine the requirements of the program. An assessment that incorporates iterative rounds of analysis (time and budget permitting), using both qualitative and quantitative methods, is more likely to lead to a flexible program design suited to the local context and culture. If doing multiple rounds of analysis, consider seeking out inputs from different people within the same stakeholder group so that you do not tax the same participants with too many demands. Consider participants' education and knowledge levels⁸, as well their psycho-emotional needs, all of which can impact program content. Participants' engagement will depend on whether they view the program as applicable to their real-life problems and as an opportunity to gain new skills. During this phase, determine the availability and quality of local advisory service providers who can assist during your program and after completion, if needed.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
<h3>Country</h3>		
SECURITY AND SAFETY		
Assess security needs of program providers and participants	<ol style="list-style-type: none"> 1. Do participants or providers need background checks? 2. Does your client or sponsoring organization need to authorize program participants? 3. Do participants and providers need specific training for emergency situations? 4. Do participants or providers need security protection all or some of the time? 	<ul style="list-style-type: none"> ▸ Determine how to conduct rigorous background checks before selecting participants or providers for the program. ▸ Determine requirements for accessing the training facility (for example, ID checks at security desk). ▸ Obtain a full, up-to-date briefing on security issues from the identified security officer in the program location. ▸ Consider additional training for program providers in how to operate securely in FCS.⁹

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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SOCIAL AND CULTURAL NORMS

<p>Assess how existing political, social, economic, and safety factors are likely to impact program content and its acceptance and application</p>	<ol style="list-style-type: none"> 1. What realities and obstacles are likely to interfere with the content? 2. What adjustments to the program may be necessary to facilitate participants' acceptance and application of program content? 	<ul style="list-style-type: none"> ▸ Identify local contextual issues that may require changes to program content.¹⁰
<p>Survey existing and past programs conducted in this or similar regions</p>	<ol style="list-style-type: none"> 1. What programs have been successful in this region or regions similar to it? 2. What factors were instrumental in these programs' success? 3. How can those factors be duplicated or incorporated into your program? 4. Is it possible to leverage resources from other programs conducted in the region? 	<ul style="list-style-type: none"> ▸ Look at the success of existing training programs in FCS and build on them where possible (in terms of content or methodology).¹¹ ▸ Leverage existing programs to access providers, deliver training, and keep costs low.

ECONOMIC STABILITY

<p>Determine sophistication of private business culture in the region</p>	<ol style="list-style-type: none"> 1. What progress has the region made in transitioning from state-owned/publicly-led enterprises to privately-owned enterprises? 2. How sophisticated are participants in running and growing their businesses? 3. What additional training in business concepts may be necessary for program participants? 4. What potential business opportunities exist for graduates of your performance improvement program? 	<ul style="list-style-type: none"> ▸ Educate yourself on the history and business culture of the region. ▸ Look at the success and growth rates for businesses in the area. ▸ Identify topics which may need additional elaboration for participants unfamiliar with private enterprise concepts. ▸ Evaluate market opportunities available to participants to exercise and expand skills and knowledge learned in your program.
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ECONOMIC STABILITY (cont.)

Determine availability and quality of local advisory services	<ol style="list-style-type: none"> 1. Can local advisory service providers support and follow up the performance improvement program? 2. What is the quality of these local services? 	<ul style="list-style-type: none"> ▸ Obtain lists of local advisory service providers (such as business development services or independent consultants) who can complement and support your program both during and after program completion. ▸ Determine the quality of local advisory service providers. ▸ Consider capacity-building for local advisory services (for example, train-the-trainer capacity building, development of coaching skills)
Identify economic issues and set program fees	<ol style="list-style-type: none"> 1. Could currency exchange rate fluctuations impact participants' abilities to pay program fees or the organization's ability to pay fees to program provider(s)? 	<ul style="list-style-type: none"> ▸ Determine currency in which local providers prefer to be paid. ▸ Determine whether payment to foreign providers is prohibitively expensive for the local organizer.

TECHNOLOGY

Mitigate for technological failures at the program venue	<ol style="list-style-type: none"> 1. What contingencies are necessary if technology fails at the training venue? 2. What back-up equipment may be necessary? 	<ul style="list-style-type: none"> ▸ Seek advice from local organizer/partner regarding logistical constraints. ▸ Consider whether solar-powered equipment would work as a back-up. ▸ Identify simple, low-technology methods trainers could use as a back-up.
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INFRASTRUCTURE AND LOGISTICS

Assess transportation options for program providers and participants	<ol style="list-style-type: none"> 1. What alternative training approaches may be appropriate? 	<ul style="list-style-type: none"> ▸ Research different delivery methods and likely participation rates (for example, phone-administered training or blended training incorporating face-to-face and telephone or online sessions). ▸ Assess scalability of the program based on participants' access to training venues or technology. ▸ Consider the geographical spread of participants, as this could have an impact on attendance and attrition.
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CONSIDERATIONS AND TASKS	QUESTIONS	TIPS AND APPROACHES
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Individual

CONFIDENCE/RESILIENCE		
<p>Determine ways to support participants' psycho-emotional needs</p>	<ol style="list-style-type: none"> 1. How can you best support prospective participants while researching their performance needs? 2. What emotional “hot-buttons” are likely to cause strong reactions when conducting needs assessments, interviews, or focus groups? 3. What flexibilities should be built into the performance needs assessment? 	<ul style="list-style-type: none"> ▸ Be sensitive to the emotional and psychological impacts of FCS. It may be necessary to leave more time for listening, discussion, and trust-building when interacting with participants to collect information.
<p>Assess need to include activities to build participants' persistence, self-esteem, and confidence</p>	<ol style="list-style-type: none"> 1. Do participants' confidence in their skills match their actual abilities? 	<ul style="list-style-type: none"> ▸ Determine whether resilience training should be embedded in the program. ▸ Compare observed abilities with self-assessments. If confidence is lower than actual abilities, consider building activities into the pre-work or course work to build confidence.

© FCS CONSIDERATIONS WHEN DESIGNING CURRICULA / DESIGNING LEARNING EXPERIENCES¹²

Designing Curricula refers to the design of frameworks for interrelated learning experiences, activities, and materials to build participants' competence and confidence. The curriculum makes a high-level program strategy more concrete and tactical and acts as a roadmap for the design of learning experiences. It provides higher-level learning objectives, learning experience outlines, and summaries of learning activities within a learning experience. It identifies the duration of each section of the learning experience and identifies how to measure successful completion of each objective. Needs assessment results directly contribute to the decisions made in curriculum design.

As a reminder, the main objectives of Designing Curricula are to:

- Sequence learning objectives and performance outcomes so that participants can start applying new knowledge on the job as soon as possible.
- Sequence learning to optimize retention.
- Identify and integrate other goals (for example, personal development or understanding) where feasible.
- Identify the most effective formats and channels for participants.
- Identify a specific path for each job role or experience, education, and skill level.
- Identify potential reuse of components of the curriculum, promoting efficiency in developing experiences and materials.
- Specify guidelines, templates, and similar resources to promote consistency during development.
- Integrate cognitive and psychomotor learning effectively.
- Pilot various components of the curriculum before full-scale development or rollout of all experiences and materials.

Designing Learning Experiences focuses on planning and developing learning experiences, from creating a 15-minute self-paced e-learning tutorial to setting up a social platform for employees to learn from each other and creating instructor-led training delivered in a classroom or even in a field.

Designing Learning Experiences starts with a clear understanding of the business measures and desired performance outcomes. All content and activities should align directly with achieving these outcomes and measures. The outputs for Designing Learning Experiences can include facilitator and participant guides, presentation slides, reference material, job aids, e-learning, self-study materials, tools, posters, or other learning material, train-the-trainer sessions, class scheduling, and logistics.

As a reminder, the main objectives of Designing Learning Experiences are to:

- Align learning objectives with desired performance outcomes and business measures.
- Include “need to know” content instead of “nice to know.”
- Present content clearly and concisely.
- Provide frequent and effective practice opportunities.
- Create materials that support learning.
- Create tools and methods to measure the participants' new skills and knowledge.
- Create tools and methods to measure how much of the learning participants use in the ‘real world.’
- Design learning experiences that enable your facilitators and participants to succeed.
- Prepare for delivery.

When Designing Curricula and Designing Learning Experiences for programs in fragile and conflict-affected situations, remember to consider what content, activities, and support work best for participants and providers in an unpredictable environment. You may need to accommodate differing literacy and educational levels among participants or differing degrees of psychological well-being and resilience. Using local training providers and subject matter experts who are already familiar with the local context¹³ can speed development and delivery, improve effectiveness, and potentially reduce costs. You may also need to consider any security precautions for facilitators and participants prior to program delivery.



CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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Country

SECURITY AND SAFETY

<p>Arrange for extra security precautions for facilitators and participants to take, prior to program delivery</p>	<ol style="list-style-type: none"> 1. Do participants need safety and security training or briefings? 2. Who can provide comprehensive security information, relevant to the local context? 3. How much time should be allocated for such training? 	<ul style="list-style-type: none"> ▶ Budget time and resources for safety training. ▶ Do not advertise in public or social media unless it is safe to do so. ▶ Only provide training locations to registered participants. ▶ Share the phone numbers and contact information for key organizers and trainers with participants before the program or training, if appropriate. ▶ Collect emergency contacts from all participants. ▶ Share the contacts of relevant embassies and consulates if involving foreign providers or participants.
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SOCIAL AND CULTURAL NORMS

<p>Align learning with social and cultural norms</p>	<ol style="list-style-type: none"> 1. How can you adapt the curriculum and the program content for the local context and audience? 2. Who can review the curriculum to make sure it is appropriate for the local context and for participants' skill and knowledge levels? 3. Who should check the program content for contentious issues? 4. Are there tensions among participants that need special attention? 5. Have local leaders endorsed the activities included in the curriculum? 	<ul style="list-style-type: none"> ▶ Consult with local specialists to receive feedback and confirm that the curriculum maps well with the local culture, skills, knowledge, and needs of the participants. ▶ Customize program examples and case studies to reflect the special needs, cultural sensitivities, and conditions of participants in fragile and conflict-affected situations. ▶ Exercise care while selecting images for slides and handouts. Ask local subject matter experts to check your material. ▶ Determine whether it is possible to invite people from different regions or countries. ▶ Ensure participants are not from tribes, groups, or clans with a history of conflict. ▶ Use qualified local experts as trainers and prepare them for facilitation. ▶ Train trainers in how to address volatile topics (should they arise) and promote peaceful discussion. ▶ Determine who—if anyone—needs to endorse learning content. Endorsements from local leaders (business, religious, and others of influence in the community) can improve program acceptance.
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ECONOMIC STABILITY

<p>Consider financial constraints of the program</p>	<ol style="list-style-type: none"> 1. How can you minimize costs for participants? 2. How can you minimize costs for the client organization and sponsoring agencies to maintain the program after initial funding runs out? 	<ul style="list-style-type: none"> ▶ Consider distance education methods to reduce travel costs. ▶ Minimize handouts to offset printing costs. ▶ Consider using flip charts and posters instead of computers and projection equipment to reduce equipment costs and minimize dependence on unreliable internet or power supplies
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LEGAL ENVIRONMENT**Obtain a legal review of program content**

1. What local laws do you need to check to confirm program content is clear of any contentious issues?

- Obtain a full legal review of program material to ensure it does not contravene local laws.
- Ask your client for suitable sources of legal advice.

INFRASTRUCTURE AND LOGISTICS**Embed flexibility in program design**

1. What preparations should you make in order to respond to disruptions?

- Consider alternative delivery methods.
- Design training in shorter “learning bites” that can be delivered at flexible times.
- Discuss backup options in the event of logistical failures with facilitators, as part of the training of trainers.

Individual**CONFIDENCE/RESILIENCE****Plan and create activities to reinforce participants’ persistence, self-esteem, and confidence**

1. What activities can you incorporate or adapt into the program design to reinforce these qualities?

- Find individual and group activities that accentuate development of personal resilience and self-confidence.¹⁴
- Design opportunities for each participant to lead small group discussion activities.
- Link activities to self-reflection exercises related to persistence, self-esteem, and confidence.
- Provide time in proposed activities for participants to vent their frustrations and fears.
- Take time during the training of trainers to discuss potential psycho-emotional needs of participants.

EDUCATION AND SKILLS**Gather information about participants and decide on the sequence of learning experiences (including remedial training)**

1. What skills are needed before the training to make participants more confident in their ability to participate fully in the program?
2. Will the course need more time than usual to finish activities or discussions, accommodate lower skills levels in fragile and conflict-affected situations, or meet translation issues?

- Develop pre-course training to help participants raise their baseline skills.
- Recommend creating post-course learner support groups where participants can use their new skills and get feedback and encouragement from their classmates.

FCS CONSIDERATIONS WHEN FACILITATING LEARNING

Facilitating Learning can range in scope from coaching a few people in a meeting room, or even under a tree, to leading a webinar with hundreds or thousands of participants.

As a reminder, the main objectives of Facilitating Learning are to:

- Create an environment conducive to learning.
- Provide an engaging learning experience for your participants.
- Keep participants on task and accountable for their learning.
- Optimize opportunities for participants to interact and practice.
- Tailor learning experiences to the specific needs of individuals and groups.

- Help participants efficiently achieve the set learning objectives.

When Facilitating Learning for programs in FCS, it may be necessary for you and your program participants to engage in a safety briefing on preventative security measures prior to the training itself. While conducting training be sensitive to cultural and political differences and maintain focus on the course topic by establishing and reinforcing ground rules. Support participants’ psycho-emotional needs. Consider postponing the program if a traumatic event has occurred just before the program was scheduled to start. Be flexible in training delivery and prepare alternative activities and delivery methods, as needed. Be patient and allow plenty of time for participants to practice the material.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
Country		
SECURITY AND SAFETY		
Provide training in safety and emergency procedures	<ol style="list-style-type: none"> 1. What training in emergency procedures do participants and providers need? 2. What security precautions should be followed prior to training? 	<ul style="list-style-type: none"> ▸ Always make the safety of the program providers and participants your top priority. ▸ Share and practice emergency procedures with participants and providers. ▸ Conduct training and drills on how to handle accidents. ▸ Conduct at least one drill to practice evacuation procedures, lockdowns. ▸ Confirm that everyone knows how to reach the designated safe refuge assembly area and hold “roll call” to account for all participants. ▸ Arrange for all facilitators to attend a mini-first aid and emergency evacuation course.
Maintain security	<ol style="list-style-type: none"> 1. How do you ensure the safety and security of participants during the program? 	<ul style="list-style-type: none"> ▸ Arrange for a vehicle to be available in case of emergency (parked at the venue). ▸ Provide participants with emergency contact numbers. ▸ Be prepared to cancel or relocate training at short notice. ▸ Regularly monitor the security situation near the venue and transport routes and provide participants with timely updates.



SOCIAL AND CULTURAL NORMS**Pre-empt any volatile issues during training delivery**

1. What “hot topics” are likely to arise?
2. How can the facilitator help participants discuss sensitive topics in a calm, respectful, productive manner?”
3. What clothing is appropriate for the training venue?

- Be sensitive to cultural and political differences.
- Be sensitive to local dress codes.
- Set ground rules and topics that are appropriate for discussion.
- Set ground rules on being respectful of other opinions.
- Maintain focus on the course topic by referencing established ground rules.

ECONOMIC STABILITY**Confirm funding for operation of the program**

1. What arrangements need to be made to confirm there is sufficient cash on hand during the program?

- Maintain a small cash float.

TECHNOLOGY**Prepare a backup plan for technical failures**

1. Is backup equipment available at the training venue?
2. What alternative training methods can you use in the event of a disruption?

- Check that your equipment is compatible with local power plugs and voltages.
- Secure a generator or consider battery-powered equipment.
- Confirm batteries are fully charged. Have spare batteries and chargers available.
- Have printed material on hand in the event of power failure (paper copies of slides, printed scripts of videos).
- Provide downloads of program content. If participants have access to smartphones, the content can be downloaded to their phones.
- Confirm phones are fully charged.

INFRASTRUCTURE AND LOGISTICS**Prepare a backup plan for logistic failures**

1. Are backup services available at the training venue?
2. What alternative training methods can you use in the event of a disruption?

- Confirm the availability of water, food, wash-rooms, communications, photocopying services, etc. at or near the venue.
- Confirm access to flipcharts, blackboards, Post-Its, pens, markers, tape for flipcharts, paper, etc.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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Individual

CONFIDENCE/RESILIENCE

Support participants' psycho-emotional needs during the program	<ol style="list-style-type: none"> 1. How can the facilitator become sensitized to possible psycho-emotional needs of participants? 2. How should the facilitator handle psycho-emotional needs if they are raised during class? 3. How can facilitators tailor relevant examples to support participants? 	<ul style="list-style-type: none"> ▸ Take time during the training of trainers to discuss potential psycho-emotional needs of participants. ▸ Provide time for prospective participants to vent their frustrations and fears. This may require extra time during program activities. ▸ Consider postponing the program if a traumatic event has occurred just before the program, as people may be unable to focus on the program. ▸ Be flexible in training delivery. Be prepared to provide alternative activities and delivery methods, as needed. ▸ Use examples that reflect the challenges and factors of the local setting.
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EDUCATION & SKILLS

Be patient and allow plenty of time for participants to practice during the program	<ol style="list-style-type: none"> 1. Is the level of education of participants what was expected? 2. Are there ways to leverage the knowledge in the room to help those with lower skills? 3. Are facilitators able to regularly change their teaching approach? 	<ul style="list-style-type: none"> ▸ Emphasize the need for patience to build plenty of time for practice and repetition and use hands-on exercises wherever possible. ▸ Consider using more competent participants to help or mentor those who need more help. ▸ Change regularly the teaching approach to cater to different types of learners and keeps the training active and engaging. ▸ Have a backup plan for how to adjust the agenda in case activities take longer than expected.
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© FCS CONSIDERATIONS WHEN SUPPORTING THE TRANSFER OF LEARNING



Supporting the Transfer of Learning provides activities and materials that help participants to take what they have learned and apply it at work or at home. These follow-up interventions may include reminder emails, feedback and coaching by a manager or mentor, job aids, discussion forums, web-based tools, additional opportunities for practice, and recognition for changes in behavior.

Supporting the Transfer of Learning increases the probability that participants continue to use their new knowledge and skills after program completion. Design and development of this component should start when first designing learning experiences. It has its own phase/competency because of its importance to the successful application of learning.

As a reminder, the main objectives of Supporting the Transfer of Learning are to:

- Address considerations for transfer during the needs assessment phase.
- Design and develop materials to support the transfer of learning.
- Prepare coaches and mentors to support the transfer of learning.
- Position content and activities during the program to support the transfer of learning.
- Conduct transfer of learning activities.

When designing transfer of learning activities and materials for programs in fragile and conflict-affected situations, remember to arrange safe venues and travel routes for all program follow-ups. Support the psycho-emotional needs of participants and promote ongoing peer support networks to strengthen the transfer of learning.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
Country		
SECURITY AND SAFETY		
<p>Arrange for safe venues and travel routes for program follow-ups</p>	<ol style="list-style-type: none"> 1. How can the post-program providers and participants be informed of emergency procedures? 2. What emergency updates need to be conveyed to the post-program providers and participants on a regular basis? 3. Are security escorts required for travel? 	<ul style="list-style-type: none"> ▸ Identify all emergency exits in the post-program venue. ▸ Have a vehicle always available in case of emergency (parked at the venue). ▸ Obtain regular security updates. ▸ Regularly monitor the route to the post-program venue and areas surrounding the venue. ▸ Be prepared to cancel, postpone, or relocate the program follow-up activities at short notice. ▸ Hire professional transport or security escorts for program participants or providers, where necessary. Consult with your client, organization, embassy, consulate or another trusted, locally-operating organization for a list of trusted organizations to hire.

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
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SOCIAL AND CULTURAL NORMS

Avoid political or social sensitivities in program follow-ups	1. How should the program provider communicate program results to clients, sponsors, and participants?	<ul style="list-style-type: none"> ▸ Report on program results as objectively as possible, while steering away from sensitive political, social, or religious matters.
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ECONOMIC STABILITY

Develop a cost-effective post-program support	1. How can you provide timely support that is economically feasible for both the participants and the sponsoring organization?	<ul style="list-style-type: none"> ▸ Use local business development service providers (if available). ▸ Build on existing personal and business-to-business networks to provide support in the transfer of learning. ▸ Coordinate with managers and supervisors to build coaching opportunities at work. ▸ Coordinate with employment associations and employers to build volunteer or internship opportunities for unemployed participants to practice skills and knowledge gained from your program. ▸ Design transfer of learning opportunities in a flexible way that is convenient for both the employer and the program participant. ▸ Offer incentives such as help with bank loan applications or opportunities to obtain advice from local business leaders. ▸ Provide free transportation to post-program meetings.
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TECHNOLOGY

Determine participants' access to technology that can support post-program distance education	1. What alternatives are available to reinforce learning post-program?	<ul style="list-style-type: none"> ▸ Ask participants and clients for their preferred communication method (for example, e-mail, telephone, WhatsApp, etc.)
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Individual

CONFIDENCE/RESILIENCE

Support participants' psycho-emotional needs after the program	1. What psycho-emotional supports are needed and are feasible post-program?	<ul style="list-style-type: none"> ▸ Consider whether it is appropriate to provide contacts for local counseling services. ▸ Maintain an encouraging, supportive tone without being patronizing.
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NETWORKS

Promote the creation of networks between participants

1. What special support will participants require from a coach or employer when applying newly-learned knowledge or skills?
2. What is the best way to provide support?
3. Does the program design encourage participants to continue interacting after the program's conclusion?

- Work with clients or sponsors to secure coaches, mentors, or activities for post-program support.
- Encourage interactions among participants to share their applications of learning and other experiences. This can promote resilience and self-confidence among participants by linking them with individuals facing the same type of challenges.

FCS CONSIDERATIONS WHEN EVALUATING LEARNING



The overall purpose of Evaluating Learning is to determine the effectiveness of the learning program and whether it met performance and business objectives. Evaluating learning can take many forms, including surveys of participant reaction, knowledge tests, skill demonstrations, comparisons of pre and post-learning performance, and calculations of return on investment.

As a reminder, the main objectives of Evaluating Learning are to:

- Identify appropriate and realistic measures for each level of evaluation.

- Produce effective learning that is useful for participants and their organizations.
- Gain a comprehensive perspective of modifications that can improve future learning experiences.

When designing and implementing evaluation activities and materials for programs in fragile and conflict-affected situations, remember to use appropriate collection methods and to document and evaluate factors that influenced participation and engagement. This may include the proximity and safety of the venue, impact of resilience-building activities, and learning transfer interventions (mentoring, coaching and networking).

CONSIDERATIONS AND TASKS	QUESTIONS 	TIPS AND APPROACHES 
Country		
SECURITY AND SAFETY		
Update security information for future programs in the region	<ol style="list-style-type: none"> 1. What security information or learnings may be useful for future program providers? 2. What worked, and what would you have done differently? 	<ul style="list-style-type: none"> ▸ Document learnings from the program cycle and share with peer networks.
Arrange for safe venues and transport during post-program data collection	<ol style="list-style-type: none"> 1. What arrangements should be made to ensure the safety of program evaluators and participants? 	<ul style="list-style-type: none"> ▸ Identify data collection periods and locations that do not coincide with politically-charged moments or periods of conflict and violence. ▸ Please see earlier considerations on safety and apply them to data collectors, as well as participants.
ECONOMIC STABILITY		
Establish baseline economic data	<ol style="list-style-type: none"> 1. How did the program impact participants' financial well-being? 2. What is the estimated return on investment of the program for the client/sponsor? 3. What economic issues may be important for future program providers? 	<ul style="list-style-type: none"> ▸ Collect pre-program and post-program economic data of the participant group. ▸ Determine whether the program had any direct effect on the participants' economic situation. ▸ Identify performance improvement programs offered by other providers or organizations and other factors over the same evaluation period that might have also contributed to the improvement. ▸ Calculate the program's estimated return on investment of the program to help make a business case for future clients and sponsors. ▸ Document and share lessons learned about addressing economic issues.



ECONOMIC STABILITY *(cont.)*

<p>Identify macro-economic issues that affected program results</p>	<ol style="list-style-type: none"> 1. How did the economic situation of the region affect program outcomes? 	<ul style="list-style-type: none"> ▸ Identify non-performance related factors that affected business results (for example, political instability and social unrest).
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LEGAL ENVIRONMENT

<p>Document learning about legal requirements</p>	<ol style="list-style-type: none"> 1. What legal requirements may future program providers need to know? 2. What legal requirements might interfere with collecting or sharing of pre- or post-program data 	<ul style="list-style-type: none"> ▸ Document and share lessons learned about addressing legal needs with peer networks.
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TECHNOLOGY/INFRASTRUCTURE AND LOGISTICS

<p>Document learnings related to technology and logistics</p>	<ol style="list-style-type: none"> 1. What technological and logistical lessons may be important for future program providers? 2. How did the venue location, scheduling, and use of technology affect the program's attendance rates? Was the attendance rate close to what was expected? 	<ul style="list-style-type: none"> ▸ Document and share lessons learned about addressing technical and logistical needs. ▸ Obtain feedback on the best timing, location, and learning approaches for future programs that could help to minimize participant attrition.
<p>Identify data collection options</p>	<ol style="list-style-type: none"> 1. What data collection methods are appropriate for the region? 	<ul style="list-style-type: none"> ▸ Identify the best option for data collection for the region (for example, a high-tech/low travel method versus a low-tech/high travel method)

Individual

CONFIDENCE/RESILIENCE

<p>Document psycho-emotional learning needs</p>	<ol style="list-style-type: none"> 1. What psycho-emotional learning needs and mitigation strategies may be important for future programs? 2. Did the program provide a supportive environment in which participants could interact and learn from one another? 	<ul style="list-style-type: none"> ▸ Document and share lessons learned about addressing psycho-emotional needs of program participants. ▸ Use data collection methods that create a safe emotional environment, where participants feel comfortable sharing their opinions. ▸ Decide how best to communicate program and training results, considering cultural and religious norms, political circumstances, beliefs and behaviors.
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Case Study: Operating a training and consulting company in Yemen

Capital Management & Consulting (CMC) is a training and consulting service provider in Yemen. The experience of CMC vividly illustrates how war and its economic, political, and social repercussions impacted the company, and how it demonstrated resilience by cutting overheads and developing flexible programs and services.

The long-running armed conflict in Yemen resulted in a sharp decline in demand for CMC's services— training and consulting were no longer high priorities for many of its clients. At the same time, damage to Yemen's power grid severely impacted CMC's ability to function. As the conflict intensified, it became increasingly difficult to travel to provinces where the company performed much of its work.

CMC responded by storing fuel for its own generator and restricting working hours to minimize energy consumption. Eventually, CMC secured solar energy supplies, although at a much higher cost than traditional power supplies. To cut overhead costs, it formed an alliance with three other training companies and moved into shared premises. Subcontracting local training providers reduced some of its travel costs and logistics. In addition, rather than paying for training venues, such as hotels, and to minimize participants' travel costs, it focused on onsite training at clients' premises.

Despite the security difficulties, CMC made repeated visits to key clients to stay up to date on their needs and training priorities. It modified its services and offered discounts. It launched social media campaigns¹ to raise its profile and attract new business. Then, when internet services deteriorated, it switched to manual course registration and documentation. CMC also developed a continuity plan for services and trained its streamlined workforce to ensure compliance.

¹ <https://www.youtube.com/channel/UCflUWj7x62l2climpQyVVg>

CONSIDERATION	KEY FACTORS	WHAT CMC DID
Country	Security and safety	<ul style="list-style-type: none"> ▶ Because of travel restrictions, CMC identified safe onsite client training venues for its training participants. CMC purposefully avoided venues such as hotels which are commonly targeted during conflicts. ▶ CMC took care to organize secure manual course registration procedures and documentation, to ensure it delivered its training to the intended participants. ▶ When online training delivery was available, CMC took advantage of social media platforms such as YouTube to convey key training content, minimizing the risk of attending classes in person.
	Social and cultural norms	<ul style="list-style-type: none"> ▶ By subcontracting local training providers, the examples and cases used in CMC training resonated well with the special needs, cultural sensitivities and conditions of its participants. ▶ CMC conducted training only in local venues, thereby avoiding potential conflicts arising from participants who come from a different region of the country.
	Economic stability	<ul style="list-style-type: none"> ▶ CMC allied itself with three other training companies and shared premises in an effort to reduce overhead costs. It further modified its services and offered discounts to sustain business during a trying time and maintain programs critical for its clients. ▶ CMC worked with local advisory service partners who were able to complement and support the program. This not only minimized program travel costs for both CMC and its training participants but helped to further support a fragile economy during times of conflict.
	Technology	<ul style="list-style-type: none"> ▶ CMC mitigated technological shortcomings by minimizing energy consumption and investing in a solar-powered generator as a back-up.
	Infrastructure and logistics	<ul style="list-style-type: none"> ▶ CMC used client venues and subcontracted local trainers to conduct its training programs, in an attempt to reduce travel logistics and costs. ▶ CMC also experimented with online training delivery to bypass logistical issues associated with live training.
Individual	Confidence/Resilience	<ul style="list-style-type: none"> ▶ By using local trainers, CMC's training program delivery was more attuned to sensitivities of local trainees and their psycho-emotional support needs.
	Education and skills	<ul style="list-style-type: none"> ▶ Using local trainers and service providers enabled CMC to offer post-training learner support.
	Networks	<ul style="list-style-type: none"> ▶ By relying on its established networks of local training providers and its clients, CMC was able to circle back to training participants to gauge effectiveness and application of the training it provided and keep up-to-date on its clients' needs and priorities.

Source: Adnan Al-Sada, CEO CMC and IFC-certified Master Trainer, 2018.



REFERENCES

- ¹ <https://www.worldbank.org/en/topic/fragilityconflictviolence/overview>
- ² Saraf, Priyam. 2019. "A Study of Fragility, Entrepreneurship and Mental Health: Investing in Better Cognitive and Behavioral Skills for Small Medium Enterprise Entrepreneurs to Thrive in Conflict- Affected Areas of Pakistan." The International Bank for Reconstruction and Development, World Bank Group, Washington, DC.
- ³ For example, in a more traditional environment, professionals establishing a training program may stop to think about the food needed for the duration of the day. By contrast, in fragile and conflict-affected situations, a lack of food might interfere with a participant's ability to attend or focus on the content; therefore the program might need to provide additional food supports reaching beyond the participant or the class hours in order to relieve immediate physiological needs and enable the participant to focus on the subject at hand. Can you add examples of supports that go beyond the participant or class hours?
- ⁴ Peer-to-peer learning is a critical component of sustainability and growth results for entrepreneurs. IFC observation.
- ⁵ David K. Evans, Fei, 2018. "What Works to Improve Access and Quality of Girls' Education: The Missing Evidence." World Bank, April 10. Adolescent Girls Initiative pilots in Haiti, Liberia, and Rwanda provided stipends that were tied to attendance and punctuality to offset participation costs, including transportation costs and foregone income.
- ⁶ Stipends can have tradeoffs. While they may allow the poorest to participate, they can also create adverse incentive. Some participants might be more motivated by the money rather than the project goals. Adolescent Girls Initiative. A Resource Guide. Design. Promoting young women's inclusion. Available at: https://www.s4ye.org/agi/html/Project_Design_Promoting_Young_Womens_Inclusion.html
- ⁷ In contexts affected by fragility, conflict, and violence, the combination of regular business-related entrepreneurial stressors with the uncertainties in the external environment can amplify poorer psychological outcomes and further impede business performance. A study conducted by the World Bank in Pakistan's Khyber Pakhtunkhwa province, which has suffered from armed conflict for the last three decades, showed that cognitive behavioral therapy training called Problem Management Plus for Entrepreneurs, in combination with financial assistance, is more effective at reducing psychological stressors of small and medium enterprise entrepreneurs than financial assistance alone. Priyam Saraf. 2019. "A Study of Fragility, Entrepreneurship and Mental Health: Investing in Better Cognitive and Behavioral Skills for Small Medium Enterprise Entrepreneurs to Thrive in Conflict- Affected Areas of Pakistan." The International Bank for Reconstruction and Development, World Bank Group, Washington, DC.
- ⁸ In fragile and conflict-affected situations, initial assumptions about the baseline capacities of participants for technical trainings and skills development can be inflated, and the training may not be fully effective without enough time built in to ensure solid foundations are established. IFC observation
- ⁹ World Bank Group SSAFE training (Safe and Secure Approaches to Field Environments) is one useful resource on safety in fragile and conflict-affected situations.
- ¹⁰ For example, Colombian participants in a training program on personal finance may be reluctant to open bank accounts. Many Colombians prefer cash and fear they may be kidnapped if others learn about the amount of money in their bank account.
- ¹¹ The World Bank, as an example, has conducted a personal initiative training in Togo and a Problem Management Plus for Entrepreneurs (PM+E) in Pakistan with significant impact.
- ¹² The considerations in fragile and conflict-affected situations for Designing Curricula and Designing Learning Experiences tend to overlap hence we have combined them in one table
- ¹³ Trainers who are familiar with the contextual factors are better able to help participants discuss their problems and brainstorm solutions. Priyam Saraf. 2019. "A Study of Fragility, Entrepreneurship and Mental Health: Investing in Better Cognitive and Behavioral Skills for Small Medium Enterprise Entrepreneurs to Thrive in Conflict- Affected Areas of Pakistan." The International Bank for Reconstruction and Development, World Bank Group. Washington, DC.
- ¹⁴ For example, in a study conducted by the World Bank, Small and medium enterprise entrepreneurs found the focus on stress mitigation in a high-risk prone environment relevant to their circumstances and wished to promote the training among their employees. The framing of the curriculum, in the language of self-management and leadership improvement, was key to achieving this outcome. Ensuring that all programming is relevant to the local context is crucial. Priyam Saraf. 2019. "A Study of Fragility, Entrepreneurship and Mental Health: Investing in Better Cognitive and Behavioral Skills for Small Medium Enterprise Entrepreneurs to Thrive in Conflict-Affected Areas of Pakistan." The International Bank for Reconstruction and Development, World Bank Group.

Continuing your own professional development

As a performance and learning professional, there are many ways you can use the competencies to support your own personal growth.

Your growth as a professional continues throughout your career. With experience, many professionals expand their roles and, in the process, master additional competencies. For example, you may start your career as a facilitator, then become a designer of learning experiences. Later, you might move to the complex field of assessing performance needs or become a leader of the learning function within an organization. Although familiarity with the other roles is essential throughout your career, you need to master the competencies for the new role with each transition.

Here are some ways you can use the competency standard framework to support your growth.

Self-assessment	Assess your current skill and knowledge against the Principles. Assess the outputs you produce against the Assessment Criteria.
Reading	Read classic and current books, articles, and websites, using the Principles as a guide.
Courses	Participate in specific institute, college, university or other programs that are mapped to these competencies.
Guided observation	Watch skilled practitioners in action, using the Principles as a checklist of criteria for successful performance. Review the products of other people's work, using the Principles as a checklist of criteria for successful performance.
Guided practice	Have a colleague observe or review your work and provide feedback, using the Principles as a checklist of criteria for successful performance.
Demonstration of mastery	Have a competent practitioner assess your performance against the Principles. One way to do this is by completing relevant certifications. Check out IFC's and other partner organizations certifications.

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