Providing Emergency Support and Advice

Distance Learning with UNHCR and the University of Wisconsin Disaster Management Center

Prepared by UNHCR Emergency Preparedness and Response Section in collaboration with InterWorks and the UW-DMC

EP-06 – Pilot version – March 2000
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Acknowledgments

This course draws on information provided in discussions and reviews with UNHCR staff and varied specialized training documents provided by UNHCR. Additionally, the illustrations of learning situations and methods for supporting colleagues in the field were collected from many people in UNHCR. This course also includes information on communicating, coaching, advising, and training from many sources beyond UNHCR where judged appropriate for use by refugee emergency response planners.

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# Planning an Emergency Response

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Welcome and Introduction

Welcome to this self-study course on Providing Emergency Support and Advice (EP06). This distance learning course deals with skills and methods for improving emergency preparedness and response for refugee and other mass displacement emergencies through advising, mentoring, coaching and otherwise training those who need to know. It is designed to build emergency response capacity within the organisation through widening and active stimulation of UNHCR's 'institutional memory.'

Purpose and Audience for this Module

This course strengthens the institution and its staff in two ways. First, by better preparing those with rich emergency experiences to train and advise others, we hope to improve the transfer of knowledge throughout the organisation at the individual level. Secondly, there are many staff members who have training or management responsibilities in emergency preparedness, even though they themselves may not have the direct experience required to be a coach, advisor or trainer. For these colleagues, the course is designed to raise awareness of the range of training, support and advice activities available to build the capacity of the organisation.

This course is designed primarily for UNHCR emergency response team members, emergency preparedness and response officers, and for anyone in UNHCR with emergency experience to share with others. Nevertheless, it may also be a valuable tool for others seeking to enhance their knowledge on training and staff development issues in general.

Link to UNHCR’s Career Management System

This course supports UNHCR’s Career Management System (CMS) competency, ‘Providing Emergency Support and Advice.’ This competency, required for emergency preparedness, is coded as EP06 within the UNHCR competency catalogue system. The competency description from the catalogue is reproduced below:

Competency in the area of emergency advice and support consists of the ability to build capacity and improve emergency preparedness and response within UNHCR through the provision of support, advice and training which is technically sound and realistic. Indicators of this competency are shown when the support provider or advisor:

1. Provides realistic advice and if necessary, a practical support service based on an in-depth understanding of the issues and constraints from his or her own deployment experience; demonstrates a flexible approach by presenting a range of options and indicating their likely consequences where possible.

2. Communicates advice so that it can be understood by staff without relevant emergency experience, explaining and justifying the rationale for recommendations convincingly so as to persuade others to implement them.

3. Plans, designs and runs training and coaching in emergency preparedness and response tailored to meet the needs of UNHCR and its partners, and delivered in a style which is appropriate to the audience.

4. Encourages formal and informal sharing of experience in emergency preparedness and response across regions, countries and offices, so that expertise can be maximised and solutions shared.
Links to Other Modules

For those wanting to study more aspects of planning and management of emergency responses, it is suggested that this course be studied in conjunction with its companion courses:

- Contingency Planning (EP-01)
- Planning an Emergency Response (EP-02)
- Managing an Emergency Response (EP-03)
- Managing External Relations (EP-04)

Organisation of This Course

This course is divided into two units and eight chapters—each dealing with a distinct theme.

Unit One provides an overview of the need for better emergency training, support and advice, some of the options for meeting those needs, a system for assessing what kinds of staff development options different people need and suggestions for improved communication skills.

- Chapter 1: Learning Options for Emergency Training, Support and Advice presents an analysis of the wide range of training options for building organisational capacity.
- Chapter 2: Key Topics for Emergency Training, Support and Advice presents opportunities and situations where you may need to provide emergency training, support and advice.
- Chapter 3: Assessing Learning Needs and Styles discusses the importance, the methods and the process for assessing learning needs and learners as well as various types of trainee competence and learning styles.
- Chapter 4: Better Support and Advice Through Better Communication is an introduction to basic and effective communication techniques including active listening, questioning techniques and written communication aids.

Unit Two discusses, in more depth, the elements and requirements for three of the learning options and concludes with a discussion of why and how to conduct training evaluations.

- Chapter 5: Coaching presents the requirements for successful coaching as well as ways that you can improve your own coaching knowledge, abilities and skills.
- Chapter 6: Effective Presentations presents the elements, and techniques for making effective formal presentations to large and small groups.
- Chapter 7: Workshop Management describes the requirements for effectively planning and managing training workshops.
- Chapter 8: Training Evaluation describes the purpose and levels of evaluation for emergency training, support and advice activities. It explores issues of reliability, and efficiency and sets out a guideline of activities that must be in place to successfully carry out different types of evaluations related to training and coaching programs.

This course is not intended to be a content-specific recipe book or template for coaching your colleagues or arranging a content specific workshop in emergency preparedness. Every situation is different and a solution that works well in one country or scenario may be completely inappropriate in another. Also, every training facilitator, coach, and advisee is unique. While several approaches are suggested in this course, these only represent a series of ideals in relation to the specific situations being described. By considering the underlying factors presented in the course and the logic of systems for designing coaching opportunities based on a clear analysis of context and need, you should be able to decide on the best approach for your own unique emergency situation when the time comes.
How to Use this Course

Self-study is more demanding than traditional classroom instruction in that each learner has to provide her or his own framework for study instead of having it imposed by the course or workshop timetable. One of the problems with self-study courses is that people begin with great enthusiasm at a pace that they cannot sustain. The best way to undertake this distance education course is to plan your own study schedule over a pre-set period by thinking ahead, and making your own schedule for study.

The course is designed to take approximately 16 hours to complete. This includes the time for reading, reflecting, answering the questions in the text, and taking the final exam.

Pre-tests

The pre-tests included at the beginning of each Unit allow you to test your general knowledge about planning for refugee and displaced population emergency situations. These two tests consist of 20 true/false questions each. Taking these tests before beginning each unit should stimulate you to compare your own thoughts about emergency response planning to those presented in the text. Also, the pre-test allows you to quickly determine how much you already know about the ideas presented here, and can help you to see which parts of the course you can move through more quickly or those you may need to spend more time on. If you score very well on all of the pre-tests, it is likely that you do not need to take this course for the purpose of learning new information, although it may be a useful review.

Instant Feedback: Self-assessment questions, exercises and worksheets

A drawback to self-study is that instant feedback from the instructor or your colleagues is not possible. To address the need for feedback, each chapter has five true-false questions and five multiple-choice questions. Exercises are found throughout the chapters to help you get the most from the materials. Each chapter concludes with a summary of key points as a review.

Final Examination

As a final complement to the self-assessment tests and problems which are included in the course text, there is a final examination administered by the University of Wisconsin–Disaster Management Center (UW–DMC). When you have completed all the self-assessment tests and activities to your satisfaction, you may request a final examination package.

Using the REQUEST FOR FINAL EXAMINATION form which accompanies these course materials, you will nominate a proctor to give you the examination and make arrangements for scheduling the time and place. Anyone in a position of educational or academic authority (for example, a registrar, dean, counselor, school principal or education officer) may serve as your proctor. Librarians and clergy are also acceptable proctors. For these UNHCR/UW–DMC courses, your immediate supervisor or someone else of authority in a disaster/emergency management organisation may also be your examination proctor.

The UW-DMC will mail the examination papers with instructions to your proctor who will monitor your taking the test. After your proctor returns your examination to the University of Wisconsin–Extension, it will normally take 1-2 months for grading. Upon successful completion of the exam, the University will record your continuing education units (CEUs) on a university transcript and prepare your Certificate of Completion. Your certificate will be mailed to you along with current information about other distance learning opportunities.
Terminology

To establish a common understanding of terms used throughout this text, the following definitions are offered:

**Coach:** A coach is usually a staff person who is responsible for providing specific job-related training, advice and/or mentoring to other individual staff or small groups of staff (up to four people usually). A coach may be a more experienced staff person advising or mentoring junior colleagues, or it may be anyone with a particular skill or experience that other colleagues lack, regardless of their time with or rank in the agency. For example, a senior staff person may share his/her emergency field experience with more junior staff members who have yet to experience a refugee emergency. On the other hand, a newer staff person with computer skills may provide coaching to a senior level manager who is unfamiliar with new computer systems and software.

**Coachee:** An individual who receives job-related training, support and advice from a coach.

**Learner:** Anyone who at any time is involved in a training or learning experience, whether this be a formal (classroom) or informal (chance encounter) situation.

**Staff development:** This term refers broadly to any activity that is employed deliberately either by a training facilitator to transfer knowledge, skills and attitudes to a trainee, or likewise by a trainee to gain knowledge, skills or attitudes for himself/herself. Staff development activities can include coaching sessions, formal presentations, workshops and seminars, independent reading and research, self-study and distance education, apprentice/learning missions to the field, task-based training and on-the-job training.

**Trainee:** For the purpose of this module, a trainee is anyone who is on the receiving end of the formal transfer of knowledge from a coach, trainer, or workshop facilitator.

**Training facilitator:** In this module, the term training facilitator refers broadly to anyone whose role or job responsibility includes the transfer and/or teaching of knowledge, concepts or skills to others. You are performing the role of training facilitator when you are coaching a colleague one-on-one, making a formal presentation to a large group, managing and/or conducting training workshops and seminars, sharing your knowledge as an EPRO when deployed to the field, or recommending to others various other learning options. Other terms associated with training facilitator include learning facilitator, training specialist, and staff development specialist.

**Workshop facilitator/workshop trainer:** Person who is responsible for organising and/or conducting formal training programs such as workshops or seminars.
Preparing to Provide Emergency Training, Support and Advice

UNHCR officer discusses mine awareness programme with colleagues in Pakistan. March 1990
UNHCR photo, A. Hollmann
1. When trying to stimulate a discussion, it is generally better to begin with very direct questions posed to an individual, as this is usually less threatening than asking general questions to the entire group.

2. Only staff with significant field experience in emergencies can sign up for the Emergency Response Team Roster.

3. A proper coaching situation requires that the staff person who is the coach be senior in rank to the staff person being coached.

4. One of the advantages of making a formal presentation is that a lot of information can be shared quickly.

5. UNHCR’s OJT roster (On-the-Job Training) refers primarily to the training and maintenance of a roster of emergency responders that can be deployed on short notice.

6. In terms of the ‘competence ladder’ of learning, staff at the ‘conscious incompetence’ stage are usually people who are eager to learn since they already understand their own need for additional training.

7. When giving feedback, constructive criticism of what the trainee is doing wrong needs to be balanced with positive reinforcement of what they are doing right.

8. In terms of the ‘competence ladder’ of learning, staff who are ‘unconsciously competent’ usually don’t need any advice or coaching.

9. The ‘Activist’ learning style refers to those who are eager, yet close-minded about new learning situations or new experiences.

10. Incompetent competence is one of the four rungs on the ‘competency ladder’ of learning.

11. ‘Reflective Activist’ is the term used to refer to learners who prefer to learn by reflecting on active experience.

12. ‘Pragmatists’ are keen on applying the new ideas, theories and techniques that they have learned.

13. During times of organisational change, it is not uncommon for current policies to clash and contradict one another.
14. The ‘Resident Co-ordinator’ model of co-ordination usually refers to the situation where the lead humanitarian co-ordinator is appointed by the in country Resident Co-ordinator.

15. The ‘Lead Agency’ co-ordination model during emergencies refers to the UN agency that is providing the majority of UN assistance and which is designated with the humanitarian co-ordination functions for the UN system during that emergency.

16. UN emergency responders need to be politically astute.

17. Contingency planning refers to the planning process of improving emergency preparedness in the face of expected threats.

18. According to the researcher Kolb, there are three main learning styles.

19. Those who have years of field and technical experience in emergencies always make the best trainers.

20. The last step in developing case studies based on your field experience is to explain the constraints that prevented certain actions from being taken.
Experience is the best teacher. Or is it? The statement ‘I saw it with my own eyes!’ characterises the belief that experience can influence us in ways that theoretical discussions cannot. At the individual level this may be true. But for an organisation, there is a need to transcend learning based solely on personal experience to the broader lessons, best practices and many divergent personal experiences of those within the organisation.

It is important that people involved in emergency response are as well prepared as possible to respond to the humanitarian needs caused by refugee and other population displacement emergencies. Better preparedness of those working in this field will lead to better management and response, which in turn will save lives and reduce human suffering. The existence of this distance education course, and the fact that you are reading it, shows a desire both individually and organisationally to improve preparedness for refugee and other mass displacement emergencies. It also reinforces the concept that we can help others learn and prepare by sharing our experiences and lessons learned.

There are many options for providing emergency training, support and advice to your colleagues. Which option is best will depend on the content to be taught or learned, the geographic location of the learners or trainees, the budget and the specific staff development goals.

What are all of the options that you can think of?
Providing Emergency Support and Advice

For the purposes of this module, staff development refers broadly to any medium or method that is employed deliberately either by a training specialist or training facilitator to transmit or transfer knowledge, skills and attitudes to a trainee; or likewise, by a trainee, to gain knowledge, skills or attitudes for himself/herself. The staff development options considered in this module include:

- EPRS missions to the field
- UNHCR staff missions/assignments to emergency operations
- Coaching, advising and mentoring
- Formal presentations
- Workshops and seminars
- Independent reading and research
- Distance-education independent study
- On-the-job training—OJT
- Task-based-training—TBT
- Formal academic courses

EPRS Missions to the Field

Learning is facilitated through the deployment from headquarters to the field of UNHCR’s Emergency Preparedness and Response Officers (EPROs). During these deployments EPROs have the opportunity to share their knowledge with others who may benefit from it. Especially in areas or offices that may not have first-hand experience with emergencies, the deployment of these experts can help transfer critical knowledge about emergencies and the ways in which UNHCR can best prepare and respond to them.

The organisational mandate and goals of UNHCR will not be best served by waiting for the next emergency to teach its harsh lessons to the staff concerned. More lives can be saved by accepting the knowledge of those who know, without waiting to ‘see it with your own eyes.’ Indeed, it is the very notion of preparedness that best illustrates the appropriateness of learning through the experience of others.

EPRS Missions to the Field (EPROs)

**Pros**
- EPROs and other experts have first-hand knowledge of emergency events and systems and can address issues with authority.
- EPROs can be deployed for contingency planning as well as emergency response situations.

**Cons**
- The need may be greater than the resource. It may be difficult to schedule or otherwise arrange for an EPRO to deploy to a specific site at a specific time due to other commitments.

Staff Missions/Assignments to Emergency Operations

Staff needing experience or enhanced skills in emergency management may also benefit directly from their own missions to other emergency situations or assignments in countries or locations other than their usual assignment. One method for gaining this type of first-hand experience is through joining the Emergency Response Team (ERT) roster for stand-by emergency deployment status within UNHCR. ERT members are trained and maintained on a roster for a period of six months (extendable

6
to one year) in a state of readiness for emergency deployment. They (and their offices) are
guaranteed that their deployment will not exceed two months. In extreme emergencies, where
the ERT is overstretched, other staff may also be called upon to undertake emergency missions.

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| **Pros** | + Staff members are exposed first-hand to emergency issues, and are supported by specific pre-deployment training (Workshop for Emergency Managers—WEM).  
+ Staff are systematically re-inserted to their ‘home’ offices, and may then further transfer their experiences to others in the office. |
| **Cons** | - Offices lose the staff member for up to 2 months, which may put heavy pressure on the operation of the office. |

**Coaching**

Coaching generally refers to one-on-one teaching and learning situations aimed at raising current levels of skills, ability and overall performance. Coaching implies a coach who gives advice and feedback on performance over time in a planned way with the same individual. A coach is usually a staff person who is responsible for providing specific job-related training, advice and/or mentoring to other individual staff or small groups of staff (up to four people usually). A coach may be a more experienced staff person advising or mentoring junior colleagues, or it may be anyone with a particular skill or experience that other colleagues lack, regardless of their time with or rank in the agency. For example, a senior staff person may share their emergency field experience with more junior staff members who have yet to experience a refugee emergency. On the other hand, a newer staff person with computer skills may provide coaching to a senior level manager who is unfamiliar with new computer systems and software. Chapter 5 presents the requirements for successful coaching.

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| **Pros** | + Informal advice builds collegiality, competence, and institutional memory by facilitating dissemination of personal experiences.  
+ Everyone has valuable experience to share; no one knows everything so the flexible approach to sharing knowledge always plays a useful role. |
| **Cons** | - Those who must be coached may feel that they are not ‘successful’ at their job or assignment.  
- If too flexible or ad hoc, no ‘driving force’ exists to initiate and institutionalise the practice.  
- Bad coaches make for bad coaching situations. Coaching itself is a skill; the best coaches are either natural teachers, or have received training in ‘coaching’ skills. |
Formal Presentations

On various occasions, you may be asked to make formal presentations based on your knowledge and expertise of emergency preparedness and response. Short presentations can be useful, especially when information must be provided to several people at once, or if you want to encourage discussion among a group. For example, you may need to present the value and procedures for contingency planning to a group of government counterparts and local NGOs in the field. Or, for example, you may be asked to make a presentation at a meeting of UN agencies and NGOs on the best ways to coordinate emergency response operations. Presentations are used when time is limited, when your training audience is large, and when most, if not all, of the content is new to the audience. Presentations can be used to transfer information, promote a strategy or viewpoint, and to inspire your audience to a particular course of action. (Chapter 6: Effective Presentations presents the elements and techniques for making effective presentations to large and small groups.

Formal Presentations

Pros
- Can deliver a lot of information quickly.
- Useful for large groups and when time is limited.
- Excellent way to introduce a framework or issue to be discussed by your audience later.

Cons
- Requires good presentation skills. If you are not a good presenter, your audience will not receive or accept the message.
- Very passive means of learning for your audience.
- Very tiring for most people after 15-20 minutes.

Workshops and Seminars

Workshops and seminars are two options for providing emergency support and advice to a larger group of participants. A seminar is a term used to describe a small group brought together for research, discussion and study. Unlike academia, where seminars rely on a ‘guru’ or expert figure to lead the discussion, in training seminars, a skilled facilitator manages the discussion and encourages broader leadership and involvement. Seminars usually are held with experienced or senior level participants.

Workshops are usually longer and will use many more diverse training methods than seminars. Workshops emphasise learning-by-doing with a strong focus on participation and practical learning exercises or problem solving activities. Workshops provide a flexible way for people undertaking similar tasks to get together in order to learn from one another and share experiences in a meaningful way. Workshop methods will include presentations by workshop trainers, experts and resource persons, as well as many interactive opportunities for participant involvement.

Because of their informal nature and the relatively ad-hoc approach to convening them, workshops have recently been the norm in emergency management training. As someone responsible for providing emergency support and advice, you may find yourself in charge of planning and organising workshops, as well as seminars. Chapter 7: Workshop Management describes many of the basic requirements for effectively planning and managing training workshops.
Workshops and Seminars

**Pros**

- Flexibility of scheduling and venue. They can be designed for specific purposes for specific audiences in the field, at headquarters, or regionally, where appropriate.
- When a large group needs to get together for training and sharing experiences.
- Can improve interpersonal communication due to face-to-face interaction; function as a team building element.
- Everyone participating is a potential teacher or trainer since they will have opportunities to share their experience, wisdom and knowledge.

**Cons**

- A content expert is not necessarily a qualified trainer or facilitator. Those leading the workshop may lack training and facilitation skills, which can have a great negative impact on the quality of the training.
- Ad hoc nature of some workshops and duration of most may not provide adequate coverage of topics—in scope and depth.
- Wide ranging experience and skills within the group tend to widen areas of discussion and reduce depth on specific topics.
- More expensive when travel and accommodation are involved.
- Not always effective in changing behaviours and thus may not have the desired impact.

Independent Reading and Research

On an individual level, personal reading and research, such as you are doing now, is also a useful way to learn. However, it is not for everybody. Some people have a low tolerance for reading training documents or specially prepared texts.

Those who tend to focus on the concrete realities of emergency situations may also learn much through careful reading of the local and international press and other media. Simply reading the daily news, however, is not necessarily enough to gain real insight. For the avid newsreader, a focused study in refugee or other mass displacement emergencies can be fascinating and extremely valuable if different viewpoints are sought and many different sources compared.

Some reading can be focused specifically on the evaluation or analysis of other past, or even ongoing, emergency responses. Analytical documents of this nature are often published as evaluation reports. Much can be learned from these since other experts in emergency response have evaluated the actions taken in each particular case, i.e. the analysis of what worked and what did not has already been done for you. One caveat in these cases, though, is simply the reminder that every evaluation is itself *biased* in one way or another. Every group, organisation or individual will be biased toward a certain approach or aspect of the emergency, the preparedness measures taken or the overall result of the response.

Those with a deep knowledge of logistics, for example, are much more likely to write a more critical review of the logistical operation of an emergency since this is the area they know best. While this may lead the casual reader to think that the major problem in the operation or response was the logistical system and/or management, this may not really be the case. The report simply focuses on the critique of what the reporter knows best.
To best account for, and balance, this type of expertise or mandate bias, look for interagency or multi-sectoral evaluations and lessons learned. Those evaluations that have distilled the lessons put together by groups of partners, insiders and outsiders, will likely be less biased than those prepared by a single sectoral expert.

In some cases, where emergencies have been very large or of tremendous impact, there will be many varying evaluations. These should be compared to one another whenever possible if your goal is to gain objective insights into the preparedness and response issues involved in the specific case. Reading can be substantially enhanced if it is guided or structured with the help of a coach or training facilitator. This will allow the reader to focus on what is important and validate understanding. Structured reading is thus the bridge to distance education and coaching.

**Independent Reading and Research**

**Pros**

+ Those interested can proceed at their own pace.
+ Those with specific or technical interest can focus on their areas of concern.
+ Evaluations have a built-in analysis along with first-hand observation of emergency operations.
+ Evaluations can be compared for further analysis of your own, i.e. between operations or between different evaluations of the same operation.

**Cons**

- Difficult to overcome inertia, i.e. to begin, since there is no date, deadline or schedule.
- Some material may be difficult to locate, especially in remote areas (although access to the internet is reducing this constraint globally).
- Some biases will be incorporated in any evaluation, be careful to understand them when considering the conclusions of the report.
- Some reports may be internal, restricted, or simply hard to find.

**Distance Education**

Distance education refers to formal learning programs or courses, sponsored by a training department or learning institution, which can be completed at a distance, regardless of where individuals live or work. This course is an example of a distance education course. It is suitable for training in areas of either general or specific information for audiences that are widely dispersed. Distance education incorporates aspects of academic training such as texts, exercises and exams, but is delivered to the learner on the spot, via post, email, the internet or some combination of these methods. Distance education mediums include correspondence courses, email, intranet, internet and computer based training (CBT) including CD-ROM, video conferencing and teletraining and multi-media.

Distance education is typically topic specific, with learners choosing only those topics of specific interest to them. Completion of the text and successful completion of a graded exam results in the awarding of a certificate of completion. Some programmes offer specialised courses of study in emergency preparedness and highly structured curricula for completion, which result in a university or institutionally supported academic certificate, diploma, or degree.
Distance Education

**Pros**
- Anyone can study at his/her own pace without travelling from his/her country, post or assignment.
- Learners can choose topics for study that meet their needs.
- For Internet-based applications, direct links to other information sources can be included with the training package.
- Distance education is often a cost-effective way to train many staff and can be completed at each person’s worksite.

**Cons**
- Difficult to ‘get started,’ many potentially interested staff may not know that programs exist or how to find out about them.
- Topics specifically prepared for this field of study may tend to be of a general, rather than specific, nature.
- Cost may be prohibitive for some as set-up costs are high, and in many cases, on-line costs are also expensive.
- Requires oversight and/or individual initiative and discipline.

On-the-Job Training

On-the-job training (OJT) refers to a non-academic and practical training program occurring at the worksite, which focuses specifically on mastering the skills and requirements listed in the trainee’s job description. In the corporate world, OJT practices include hands-on demonstrations and review of working methods and techniques. The trainee is expected to carry out core tasks while learning new or expanded roles at the same time. Expert advice is provided and there is some kind of feedback loop to monitor the performance of the trainee. Often a certificate or some other written notice is given upon successful completion of specially targeted OJT programmes.

An analysis of the major job requirements or competencies and related knowledge, skills and abilities forms the basis of the OJT plan. OJT is often used in tandem with a coach, training specialist or training facilitator who works with the trainee to plan, implement and evaluate the OJT.

On-the-Job Training

**Pros**
- Specifically matches expertise with job-specific needs.
- Learner has the ability to ask direct, specific questions and have immediate feedback.
- Coach can certify that the learner has met the required level of expertise or skill.

**Cons**
- May be difficult to find trainer in the required topic area, requires significant and system-wide support from the organisation itself to institutionalise this type of system.
- Coach must be available both formally and informally. Coach may not always be around.
- Coaches must possess good coaching skills. Some are natural coaches; others must acquire these skills through training programs.
Task-Based Training

In task-based training, the student completes a number of job-related learning tasks over a specified period of time. In addition to completing the task, the trainee is required to reflect on what he/she has learned as he/she completes the task. For example, a student learning team management skills may be required to plan, organise and facilitate an office team meeting. After the meeting, the student completes a self-evaluation of the meeting, and may also meet with an advisor or coach to discuss what went well and what could be improved.

For this type of training to work, similar to OJT, the training facilitator must first determine the duties, tasks, procedures and work standards associated with the specific job or role that the student is to be trained in. The training advisor must then design task-based learning activities that reinforce the student’s ability to effectively complete a task.

### Task-Based Training

**Pros**

- Student is learning and mastering specific job-related tasks.
- Trainee has the ability to ask direct, specific questions and have immediate feedback.
- Training advisor/coach can certify that the learner has met the required level of expertise or skill.
- Hands-on training allowing for near seamless application and reflection.
- Individual attention.

**Cons**

- May be difficult to find trainer in the required topic area.
- In order to institutionalise, it requires significant system-wide support from the organisation.
- Training advisor must be available both formally and informally: s/he may not always be around.
- Requires a skilled training advisor or coach, skilled in training who is willing and skilled in breaking down a job into specific tasks, procedures, duties and work standards.
- Limited audience since this approach is time intensive and requires close individualised supervision and a supervisor skilled in teaching, learning and coaching methodologies.
Formal University Courses

Attending a formal university course within a recognised academic discipline is a well-established and respected mode of training. Language training, for example, is often undertaken over several years in regularly scheduled classes. Management courses may be offered through local or international academic institutions in two- or four-year programmes. Formal programmes of study for emergency managers are not yet fully developed, although several universities and training centres are starting new programs in this area. Formal degrees conferred upon successful graduating students are highly regarded, but the level of prestige will depend on the reputation of the institution. Annex A is a list of institutions currently offering such coursework.

<table>
<thead>
<tr>
<th>Formal University Courses</th>
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<tr>
<td><strong>Pros</strong></td>
</tr>
<tr>
<td>+ Scheduled, graded, and afterwards recognised as carrying respect and value</td>
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<tr>
<td>+ Exposure to academic and other analytical views that may widen appreciation or thinking about approaches to emergency management</td>
</tr>
<tr>
<td><strong>Cons</strong></td>
</tr>
<tr>
<td>– May be expensive and time consuming</td>
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<tr>
<td>– Some courses may seem too academic or too distant from the learner's field-based reality to make a positive impression.</td>
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</table>
UNHCR can develop the abilities of its emergency preparedness and response staff by documenting and disseminating lessons learned and best practices of the organisation as well as encouraging staff to share their knowledge and experience with each other.

Staff development is a broad concept and can be achieved using many possible mediums including:
- EPRS missions to the field
- Staff assignments to emergency operations
- Coaching
- Formal presentations
- Workshops and seminars
- Independent reading and research
- Distance education
- On-the-job training
- Task based training
- Formal university courses

The uses and the pros and cons of each training medium are discussed in this chapter.
Chapter 1

Self-Assessment Questions

Check T or F to indicate whether a statement is True or False

1. In this module, the term ‘staff development’ is defined narrowly, referring primarily to workshops and other institutional courses.

2. Only those staff members with extensive emergency experience are allowed to join the ERT roster, as no training is provided for this group.

3. One of the advantages or ‘pros’ of independent reading is that all reading material is always and widely available when needed.

4. One advantage of a workshop is that often it can serve as a team building activity.

5. One disadvantage of relying solely on making presentations is that your audience is learning passively.

Multiple choice. Mark ALL correct statements—more than one may apply.

6. Which of the following options for staff development is the most flexible in meeting individual needs?
   - A Independent reading and research
   - B Informal ad-hoc workshops
   - C Seminars
   - D Academic courses

7. Advantages of distance education are that it:
   - A Requires relatively small start-up costs
   - B Can be combined with electronic media that can provide automatic links to other related topics and Internet sites
   - C Can be studied at the learner’s own pace and schedule
   - D Does not require extensive travel or time away from work

8. Which of the following options involve the training and maintenance of a roster of trained ERT professionals ready for emergency deployment?
   - A Task-based training
   - B Independent reading and research
   - C Staff missions/assignments to emergency operations
   - D Workshop management
9. Which of the following training options requires the trainee to complete a number of pre-determined core job or role related tasks:

A  Advising  
B  Task-based training  
C  Distance education  
D  Coaching  

10. Which of the following options allow for the trainee to learn at their own pace?

A  On the job training  
B  Workshops  
C  Seminars  
D  Distance education courses  

Exercise A  

You have been tasked with introducing the concept and the procedures for contingency planning to ten colleagues stationed in three different field offices around the world. In the space provided, discuss the ‘pros’ and ‘cons’ of using each of the following training options for delivering this training/support to your training group. 

Workshops

Coaching

Distance education course
Exercise B

Pick a specific topic, such as contingency planning, logistics, registration, or distribution, for example. In the space below suggest some ways in which emergency managers can best train their staff in that topic before and during refugee emergencies.

<table>
<thead>
<tr>
<th>Techniques/methods useful for training before emergencies</th>
<th>Techniques/methods useful for training during emergencies</th>
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Chapter 1 Answers

Exercise Answer — A

Workshops

Pros

+ One advantage of workshop training for contingency planning for 10 people is that they can share experiences from their respective offices which might provide useful insights, if they are brought together for the workshop.
+ Introducing the concept and procedures for contingency planning can be successfully done in a workshop setting.
+ All ten trainees could be taught at once if they (and you) were able to travel to the same venue.
+ Workshops allow focus on the topic presented since other work is left behind in the office.

Cons

– Cost of travel may be very high, depending on location of the ten staff members.
– If the training programme ends with the end of the workshop, there may be no chance for needed follow-up or questioning by participants as they begin to apply what they have learned.
– If the 10 participants’ experience and knowledge are very diverse, discussions of the topics may fail to satisfy those with more experience in the field and who may require greater depth in the presentations or discussions.

Coaching

Pros

+ Coaching allows more specific guidance on the procedures and techniques for carrying out contingency planning in relation to the learner’s specific situation.
+ Coaching also implies practical application of the topic while learning. It makes a better skills-building exercise if trainees are carrying out contingency planning activities while they are being coached.

Cons

– Cost of travel and time to carry out significant levels of coaching with ten people in three different locations will be very high.
– If the assumption is that there is only one coach (you), the tenth person will have to wait until you have finished coaching sessions for the other nine. Even if you are doing small group coaching session, you will have to break the group of ten into smaller groups so at a minimum you will have at least two groups to coach and follow up with.
Distance Education Course

**Pros**

+ If this same exercise is spread out over many such situations, the cost per person will be low.
+ Introducing the concept and procedures for contingency planning can be successfully done using distance education.
+ Learners can study the topic at their own pace.

**Cons**

- Some people may not be self-motivated enough to actively pursue a course of distance education.
- Self-pacing may fall behind due to other office and personal pressures.
- It is not cost-effective to develop a distance education programme if only 10 people need to be trained.

Exercise Answer — B

**Before**
Workshops, distance education, coaching, academic courses

**During**
Coaching, EPROs, staff missions to the field (ERTs)
Key Topics for Emergency Training, Support and Advice

By studying this chapter you will learn about:

- Key topics for providing emergency training, support and advice might be provided
- Converting your experience and lessons learned into case studies
- Incorporating your own experience and lessons learned into staff development activities

There are many formal and informal opportunities for providing emergency training, support and advice. Some of these opportunities will come to you in the shape of formal requests from other offices, staff and colleagues; others you must create yourself, when you sense that training or support is required.

Describe here one or two situations in which you may be asked, or in which you have been asked, to provide emergency training, support and advice. Describe both the content or information and the training option used.

Often it is very difficult to provide emergency support and advice in the midst of an emergency. The attitude is one of, ‘this is an emergency, we don’t have time to learn.’ While lengthy workshops and formal coaching sessions may not be possible, there are many other options for learning during emergencies. Morning meetings may offer an opportunity for various experts to provide brief presentations and demonstrations. For example, the communications expert may provide a quick demonstration on using the mobile communication phones. In the evening, over dinner or a drink, staff can reflect on their experience and discuss the lessons learned and what they might do differently. If there is appropriate reading material and access to the internet, one can also design an independent reading, research and action program. Managers may also design task-based training for subordinates who need to gain and enhance particular skills. With a little creativity and resourcefulness, the teaching and learning opportunities during emergencies are numerous.
Areas for Providing Emergency Training Support and Advice

In emergencies, the following issues typically arise and therefore present opportunities for teaching and advising less-experienced staff.

- Clarifying UNHCR policy issues regarding emergencies
- Managing technical and managerial aspects of emergencies
- Improving co-ordination for emergencies
- Providing analysis of political situations
- Training in contingency planning
- Working with the military
- Ensuring staff welfare, health and safety

This chapter will introduce these opportunities and describe how you can incorporate lessons learned and best practices from past operations into your emergency training, support and advice portfolio. The chapter concludes by emphasising the importance of sharing your own experience in emergency preparedness and response and suggests an approach for doing so.

Clarifying UNHCR Policy Issues Regarding Emergencies

As an experienced UNHCR emergency preparedness and response professional, you may be required to provide advice on UNHCR policy issues regarding emergencies. There are many levels of policy, and during times of change, it is not uncommon for current policies to clash, contradict, or confound one another. Some policies propose a desired state, requirement or vision to be pursued rigidly and universally, while others seem to be set firmly, but in practice, are deviated from—without reprimand—either because they are not enforceable, are contradicted by other policies, or because they do not account for the contexts and constraints of individual situations.

Being able to provide training, advice and support in this area is more than a list of published documents and papers. Real understanding of organisational policy must include both the highest level ‘visionary’ elements of policy as well as the real-life ‘expedient’ policies that are the working norm. Advising others in this area requires knowledge of the different levels and priorities of existing policies, and the professional responsibility to refrain from offering personal policies or preferences as substitutes for official policy. While this text does not list or discuss current policies in effect, the UNHCR KIMS (Knowledge and Information Management Systems) database is an important reference for UNHCR official documents and operational guidance. Current Memoranda of Understanding (MOUs) signed with other organisations and UN sister agencies are also key policy documents that apply in emergency situations.

Managing Technical and Managerial Aspects of Emergencies

This aspect of emergency management consists of three components:

The technical knowledge of logistics, water, sanitation, engineering, and other fields that are often needed in emergency response. This type of information can be readily taught and learned in a straightforward manner.

The specific way things are done in your own organisation. This includes the internal rules, administrative guidelines, and budgeting and reporting formalities. This is a kind of technical knowledge, but it also involves analysis and diplomacy and the ability to navigate the rules and regulations of the bureaucracy while getting practical results in the field.
For any staff member of a large organisation, the rules, restrictions, budget constraints, forms and protocols can be overwhelming. There are many ways that staff learn these elements over time, but many of these are learned on an ad-hoc, as-needed basis.

Very often staff find themselves aware of their own need for improvement in this area. That is, they know that they don’t know the rules perfectly, and can see the advantage of learning them better. People in this situation are often quite open to timely training, support and/or advice. You will want to focus on those areas or roles that apply to emergency situations and operations. Your advice for getting the job done while following the rules will be extremely valuable for those who may be responsible but who have not benefited from formal training in these areas.

The overall management of emergency preparedness and response—both within and outside of your own organisation—which relies on knowledge, diplomatic skills, analysis and decision-making skills. This is not a technical field of study, and is much more an art than a science. There are often no clearly defined right or wrong answers, but rather many choices—each of which may be judged right or wrong by varying measures.

Matching Training Options to Training Topics

Within these three areas of concern, the advisor must be cognisant of the type of advice needed by different individuals in relation to their own level of career development. The levels used in the discussion below are untrained in the specific area, trained but inexperienced or unsure in the specific application, or trained and experienced. Although this is an oversimplification of a person’s career development, even in specific areas of interest, it still provides a useful way of considering that different people need to know different things, and learn them in different ways, dependent on their own development. Colleagues at all of these levels may need advice and support, in different areas, at different times and in different ways. A more in-depth discussion about trainer needs and styles is provided in chapter 3.

For Technical Areas of Training

The suggestions in this section are some of the best ways of training and advising in technical areas for trainees of various levels of need, competency and experience.

<table>
<thead>
<tr>
<th>Untrained</th>
<th>Trained, but inexperienced</th>
<th>Trained and experienced</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Formal course of study, followed by field exposure and practice</td>
<td>• Exposure to application of technical expertise in emergencies through assignment or secondment</td>
<td>• Advanced training, institutional or seminar-based</td>
</tr>
<tr>
<td>• Apprenticeship or mentor relationship / OJT</td>
<td>• Emergency-focused workshops and seminars with technical focus</td>
<td>• Consultative visits/ discussions with colleagues</td>
</tr>
<tr>
<td>• Reading in sectoral/ technical areas</td>
<td>• Review of cases studies, evaluations, mission reports and other experience-based reporting and analysis</td>
<td>• Reading content-specific journals, evaluations, technical reports</td>
</tr>
</tbody>
</table>
For Training in Organisational Issues

<table>
<thead>
<tr>
<th>Untrained</th>
<th>Trained, but inexperienced</th>
<th>Trained and experienced</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Formal induction training (workshop)</td>
<td>• Performance evaluation and review</td>
<td>• Advanced, policy focused seminars (for example, UNHCR’s Advanced Emergency Management Seminar)</td>
</tr>
<tr>
<td>• Partnering with more experienced colleagues</td>
<td>• Coaching from experienced colleagues</td>
<td>• Policy specific workshops on administrative updates or changes</td>
</tr>
<tr>
<td>• Reading administrative guidelines and rules</td>
<td>• Field assignments, missions, ERT deployment</td>
<td>• Rotation, mission assignments</td>
</tr>
<tr>
<td>• Training in emergency-specific areas, for example, UNHCR’s Workshop for Emergency Managers (WEM)</td>
<td></td>
<td>• Review of organisation-specific evaluations or specially prepared case studies, OMS knowledge base</td>
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</tbody>
</table>

For Overall/General Emergency Management Topics

<table>
<thead>
<tr>
<th>Untrained</th>
<th>Trained, but inexperienced</th>
<th>Trained and experienced</th>
</tr>
</thead>
<tbody>
<tr>
<td>• EMTP (two-week broad based management workshops)</td>
<td>• Rotation, mission assignments</td>
<td>• Advanced, policy focused seminars (UNHCR’s Advanced Emergency Management Seminar)</td>
</tr>
<tr>
<td>• Distance education</td>
<td>• ERT rostering and deployment</td>
<td>• ERT rostering and deployment</td>
</tr>
<tr>
<td>• Formal management training</td>
<td>• Coaching</td>
<td>• Coaching</td>
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</table>

Improving Co-ordination for Emergencies

One of the areas of perennial concern in the field of emergency preparedness and response is co-ordination. Providing advice and support for those who must facilitate co-ordination in emergencies encompasses several knowledge and skill areas. Personal experience with organisations and understanding the different organisational cultures involved can be a tremendous support to those who are trying to design practical co-ordination mechanisms. Advice in negotiating tactics and positions will likely be an important area of consideration as well.

Your own experience with co-ordination mechanisms can help highlight the need and possibly ideas for facilitation of co-ordination in the context of those you are supporting. Letting others learn from your own failures as well as your successes is the mark of a competent coach.

Co-ordination Models

The basic types of co-ordination mechanisms followed by the UN in complex emergencies are:

**Lead Agency** This refers to the UN agency that, in a particular emergency, provides the great majority of the UN assistance and is designated with the humanitarian co-ordination functions for that emergency.
**Resident Co-ordinator** The Resident Co-ordinator is the leader of the United Nations country team and is normally the Head of the UNDP in a particular country. He or she may be designated to co-ordinate the UN response to a complex emergency in that country.

**Humanitarian Co-ordinator** If the emergency is of considerable size, a Humanitarian Co-ordinator may be appointed distinct from the office of the Resident Co-ordinator and lead agency. The Humanitarian Co-ordinator normally phases out once the emergency reaches recovery phase and any residual tasks are returned to the Resident Co-ordinator.

**Regional Humanitarian Co-ordinator** If the emergency affects more than one country, a Humanitarian co-ordinator with regional responsibilities may be appointed.

**Co-ordination Mechanisms**

For complex emergencies, UNHCR follows the systemwide model chosen by the Secretary General. With regard to refugee emergencies, however, UNHCR’s co-ordination policy typically follows the points listed below:

- UNHCR should take the lead to ensure effective co-ordination, if this is not already ensured, including establishing the co-ordinating body.
- A single co-ordinating body is required, with sectoral sub-committees as needed.
- Co-ordination must be based on good information exchange, particularly at the site level, otherwise it may even be counter-productive.

**Providing Analysis of Political Situations**

Aside from technical and management issues, a major part of emergency planning and response is involved with local and international politics. This is an area that is exceptionally well suited to personal advising and/or coaching since the nature of the material is often delicate, subject to interpretation and often not printed or published officially or disseminated. Your advice about situations or about simply the importance of understanding and keeping current with them may be invaluable to others who are or are about to be involved in these volatile situations.

The following excerpt reflects the need to provide advice and support in analysing the politics of emergency situations:

**Example**

A great part of agency ‘sitreps’ [is] now taken up with detailed reports on local patterns of conflict and alliance, and with political manoeuvring at the international level. The need to keep pace with the changing political and military configurations of events is vital to the safe and effective operation of a relief agency.

Because an increasing amount of emergency aid is now delivered on the principle of negotiated access (Duffield 1994) collecting information in complex emergencies is more akin to intelligence gathering. Agencies need to know which faction is in control where, who will be amenable to negotiation and on what terms. With relief supplies increasingly recognised as a weapon of war, sophisticated analysis of who is benefiting and who is losing out from an agency’s relief programme must be at the heart of responsible good practice (Hugo Slim, Disasters Volume 19, No. 2, p. 112).
Training in Contingency Planning

Contingency planning aims to improve emergency preparedness in the face of expected threats. This is a critical area for providing support and advice since it seeks to build preparedness in the face of uncertain situations and events—the constant reality for many offices and staff members. Being able to explain ways that you and others have initiated contingency planning in other situations can be a key intervention for more effective emergency management. The UNHCR publication 'Contingency Planning: A Practical Guide for Field Staff' provides information about the process of contingency planning and deals exclusively with the training element. You may also want to refer staff to the 'Contingency Planning' self-study module in this series.

Working with the Military

It is likely that those working in emergencies will also need to work with their military counterparts to some degree. Working with the military is a difficult prospect for many staff members. First, the military is often seen as aligned with one side or even as part of the problem. Second, the cultural difference between military and humanitarian organisations can be great enough to cause real misunderstandings. Advice about ways of approaching military personnel and examples from previous experiences can be invaluable to colleagues who may be uncomfortable in this area.

The following excerpt reflects the need for training and support related to working with the military:

In practice, however, the absence of clearly defined roles and responsibilities, coupled with the lack of an overall co-ordinating framework, meant that there was often an unfortunate distance between the humanitarian and the military aspects of the operation … exacerbated by differences in size, location, command structure, operational style and organisational culture. …

… Differences in what the military characterises as command and control structures also complicated the relationship. In the military, decision-making is highly centralized and structured, while UNHCR tends to delegate more decision-making authority to staff on the ground and retain flexibility (from 'Working in a War Zone: A review of UNHCR’s Operations in Former Yugoslavia,' UNHCR Central Evaluation Section, 1994).

The UNHCR publication 'Working with the Military' gives useful guidance on this aspect of emergency management.

Ensuring Staff Welfare, Health and Safety

Personal welfare, health, and safety are areas where personal advice is often taken much more to heart than any guideline, checklist or aide memoire in published form. People typically feel that their situation is specific, and that their relationships with the community and the context are unique. That being said, the advice of welfare, health and security experts is vital.

Personal advice, especially based on a field visit to a colleague's location, can be a very powerful prompt for taking better precautions. As you explain your own precautions in relation to experiences in other similar situations, your colleagues will likely begin to see the situation in a new light based on the importance you attach to it. Staff know about high profile cases and examples of security and other critical incidents, but often feel that this cannot happen to them. Your advice, given specifically to your colleague, regarding the specifics of their situation can have a powerful, even life-saving effect. Where possible, and always in emergencies where living conditions are extremely harsh or security is an issue, welfare, health and/or security experts should be called in to provide advice and counsel staff. In any case, the UNHCR publications 'Guidelines on Security' and 'Coping with Stress in Crisis Situations' provide useful guidance and user-friendly advice.
Chapter 2

Sharing Emergency Preparedness and Response Experiences

If you have been involved in emergency operations, you have learned your own lessons. Some of those will be useful to others. When using your own experiences in coaching or advising, it is important to take time to analyse them to find the underlying messages and key points behind what happened. In some instances, after analysis, you may even find principles or lessons that are likely to apply in many other situations.

We often say that experience is the greatest teacher since a lesson lived and learned first-hand will be remembered best. This is true, but is experience enough? One of the problems with experience, especially emergency experience is that no two emergencies are exactly alike. One of the common problems with emergency responses has been the application of ‘lessons learned’ in previous emergencies applied to new situations, without first conducting a careful analysis to determine their applicability.

Those who have years of field and technical experience in emergencies do not necessarily make the best trainers or coaches especially if they lack analytical, interpersonal and communication skills. What is needed, in addition to experience, is the ability to analyse one’s own actions and the corresponding results and to formulate ideas about how to improve performance in future situations.

As a caveat against a ‘one size fits all’ approach, some experienced professionals are too careful about giving advice based on their experiences. When the lessons you have learned seem to be nearly universal, do not be afraid to share them—making sure to explain the context of your experiences.

Developing Case Studies

Your qualifications as a coach or advisor are based largely on your experience in preparing for and responding to emergencies. Your job as a training facilitator or coach is to distil the lessons learned from your experience, identify those that seem to be transferable to other situations, and clearly explain them to your trainees. This is best done by developing case studies. The following points are a guideline for writing case studies for use in coaching and training sessions.

Reflection

The first step is careful reflection on the case or situation that you have experienced. Try to reconstruct the events as realistically and objectively as you can. Think about your own likely biases that were inherent in the situation. Are there other viewpoints about the situation that might also be valid? Who was involved? How much of your story consists of factual information and how much on subjective interpretation of the information?

Description

Do not expect your listener(s) to have the same understanding or points of reference as you do. Try to describe, as objectively as possible, what happened. Describe any pertinent background information that influenced the outcome of the situation. Typically case studies are about the resolution of a problem of some kind. Describe the specific problem within the overall emergency situation.
Analysis

Next, provide a description of the analysis you undertook during the emergency which informed your decisions. In other words, explain the reasons why you did what you did. Take the listener back to the context of the situation; then, explain how you reasoned out your response based only on the information you knew at the time. This analytical process for making decisions should be directly applicable to the advisee’s situation even though the context may be very different.

Constraints

Explain the constraints on your own and others’ actions at the time. Why were other, better options or solutions not pursued? This is an important aspect of your case study since failure or unsatisfactory outcomes may have been based on factors beyond your control. People easily connect actions taken prior to a failure to mean that those actions caused the failure. If this is not the case, make that clear.

Results

Explain the link between decisions and results, either positive or negative. For example, if a decision to house many families together led to the entire group contracting a highly infectious disease, the results of the decision would be considered negative. This would be true even if the provision of group shelter was the best available option due to constraints beyond the control of those in charge of the shelter program.

There is a difference between the best available option or decision and a good decision. Do not be overly defensive of actions that have turned out to be bad decisions; we all learn by our mistakes. The coach’s job is to help others learn from our mistakes as well.

Application

The final part of any case study is the discussion of the applicability of the lessons learned from that case to new or different cases which might confront the learner. At this point in your discussion or presentation, you need to ask the listener if he/she feels that the situation applies to him/her. Try to draw out areas that are applicable to his/her own situation or context. If you are discussing preparedness for a possible emergency situation, ask the coachee/advisee to consider how your case study might be useful to him/her and under what circumstances.

Essential Emergency-Related Reference Materials

One way of relating your own personal ‘lessons learned’ to those of the organisation is to keep up to date with current guidelines, handbooks, and training documents issued by UNHCR. These are valuable since, together, they represent the ‘state of the art’ thinking within the organisation. Several but not all are listed here.

**Handbook for Emergencies** — The UNHCR Handbook for Emergencies, first published in 1982, has long been considered an excellent source of guidance for UNHCR staff and others involved in refugee emergency response operations. The handbook is intended as a manager’s guide to setting up emergency operations for large-scale influxes and provides advice in a non-technical manner on how to tackle various aspects of emergency response. A Second Edition was published in 1999. The handbook can be requested from EPRS and is also available on the UNHCR KIMS. The handbook can be provided to NGOs and local authorities upon request.
Contingency Planning Guidelines — The Contingency Planning Guidelines are designed to assist UNHCR field staff in planning for refugee and IDP related emergency events at the country or regional level. They consist of four sections and six annexes:

Section 1: Purpose outlines the reasons for undertaking contingency planning.

Section 2: The Process describes the methods and processes used to accomplish joint planning with operational and potential partners.

Section 3: The Partners reviews typical partner agencies and their roles in planning and response.

Section 4: The Plan describes a simplified model format for contingency plans.

Annexes include UNHCR’s standby resources, early warning indicators, sectoral planning questionnaire, sample contingency plan, overhead transparencies, additional reading and resources. Copies may be requested from EPRS.

Commodity Distribution Manual: A Practical Guide for Field Staff — This helpful guide is easy to read and proposes management-oriented activities and steps to help ensure a fair, efficient and secure distribution to large populations in emergencies. It also has several useful annexes that cover different aspects of distribution reporting.

Evaluation Reports on Emergency Operations — Internal evaluation reports on specific operations are routinely carried out by UNHCR’s Central Evaluation Section. These reports are produced in order to gather lessons learned and build the institutional memory of the organisation. They typically provide a short ‘Scope of the Review’ statement explaining how and why the evaluation was written. These evaluations are either RESTRICTED, designed for internal use only, or UNRESTRICTED, which may be distributed freely. These evaluations can be extremely useful as a context for explaining your own experience and for comparing your first-hand experiences to those of others in other operations. Review of such evaluations will help you better analyse your own experiences, which in turn will help you provide advice and support to others.

External evaluation reports are also conducted, especially in the aftermath of very large or politically charged emergency operations. Many of these are done on an inter-agency basis, and provide a wider analytical view of the operation, beyond that of any single agency or mandate. A notable example is the joint evaluation that was conducted and widely distributed after the Rwanda Genocide. The International Response to Conflict and Genocide: Lessons Learned from the Rwanda Experience was conducted by a large interagency team and was published in five volumes.

Videos on Emergency Response — The Staff Development Section (SDS) may be asked to provide videos dealing with various subjects which would provide a focus for reflection and group discussion prior to and during emergencies. Some titles include ‘A Team Spirit’, ‘All in a Days Work’ (Kenya and Somalia), and ‘The Big Fix’ which deals with registration.
In preparing yourself or others to be an advisor or coach, it is important to recognize the opportunities or situations requiring emergency training, support and advice. These may include:

- UNHCR policy issues on emergencies and preparedness
- Management and administrative issues
- Co-ordination issues for organising emergency response
- Political analysis
- Contingency planning
- Working with the military
- Welfare, health and safety

Training and advising in the areas of emergency preparedness and response require dealing with different aspects of general management theory and more specific aspects such as technical knowledge, and organisationally specific protocols or approaches.

Personal experiences are an important part of training/advising sessions. It may be useful to describe these experiences using short lecturetes, presentations, and case studies. These may be complemented by the use of published materials, content experts and videos.

The steps for writing a case study include:

- Reflection
- Description
- Analysis
- Constraints
- Results
- Application
Chapter 2
Self-Assessment Questions

Check T or F to indicate whether a statement is True or False

1. When conducting training or coaching sessions, you should avoid sharing your own experience and lessons learned.

2. Political analysis is one area where coaching or personal advising may be the most appropriate training option.

3. There are currently no existing guidelines for contingency planning since every emergency situation is different.

4. UNHCR staff involved in emergency preparedness and response should develop and hone their political insight.

5. The ‘lead agency’ co-ordination model refers to the UN agency that has been designated with the lead humanitarian co-ordination function for that emergency.

Multiple choice. Mark ALL correct statements—more than one may apply.

6. Which of the following represent opportunities or situations where you might need to provide emergency training, support or advice:
   A. Technical / sectoral knowledge
   B. Historical / political knowledge about the developing emergency
   C. Overall emergency management concepts
   D. None of the above

7. Of the following, which is the best way to train your colleagues in UNHCR specific policies regarding emergencies:
   A. Encourage them to take a distance education course provided through an accredited university
   B. Coaching or workshop sessions
   C. Formal academic courses and degree programs
   D. Provide them with all of the policy documentation that exists and tell them to read and memorise it.
8. Which of the following are recognised UN co-ordination models in complex emergencies:
   - Joint co-ordination model
   - Lead agency
   - Consortium leadership model
   - None of the above
   - All of the above

9. Which of the following statements are true with regard to working with the military in emergencies:
   - Militaries providing humanitarian support are usually neutral to the conflict
   - There is often a great difference between military and civilian cultures and structures
   - Militaries have command structures similar to UN and NGO agencies
   - None of the above
   - All of the above

10. Which of the following are good ways to train an 'untrained trainee' in technical areas of training:
    - Formal course of study followed by field exposure and practice
    - Apprenticeship or mentorship relationship
    - On-the-job training
    - All of the above

Exercise

Write a two page case study about an experience you have had that you feel is applicable to other situations, that your colleagues could benefit from, and that you could use in a coaching or advisory session with another staff member. Share the case study with colleagues and discuss it.
Exercise Answer

When writing this case study, remember to follow the steps for writing and developing a case study: reflection, description, analysis, constraints, results and application.
Assessing Learning Needs and Styles

By studying this chapter you will learn about:

☐ The importance of learning needs assessments
☐ Informal and formal methods for assessing learning needs
☐ The primary components of the learning needs assessment process
☐ Four levels of professional competence and their training applications
☐ Four different learning styles and their training applications

A learning needs assessment is useful to determine whether emergency training, support and advice are required and, if so, which of the delivery options, or combination of options, outlined in Chapter 1 is most appropriate. As such, a learning needs assessment plays an analogous role to that of an emergency needs assessment. Just as an emergency needs assessment helps determine the direction and scope of an emergency response, a learning needs assessment helps develop a strategy, process or programme for offering emergency training, support and advice.

The objective of a learning needs assessment is to identify the characteristics of the training audience, their specific job performance, competency and/or information needs, their gaps in knowledge or skills, and the most cost-effective or optimal mode of training delivery. The assessor should be conscious that the trainees’ gender may impact team relationships and, consequently, their preferred learning styles. Data collected during the needs assessment—whether obtained through interviews, observations, focus groups, performance data, questionnaires or tests—can clarify issues and provide a focus on performance.

Methods of Assessing Learning Needs

The type and complexity of learning needs assessment depends on the training context, the training facilitator’s skills, the amount and level of knowledge and skills to be transferred, the availability and ease of contacting trainees, and the time and resources available. Training facilitators need to be aware of the options so that they can employ those best suited to each particular situation.

A needs assessment can be as simple as sending out a short 3-4 question pre-training questionnaire via email, or calling or meeting with 2-3 trainees prior to the training. It can also involve more complicated and time-consuming methods, such as a training needs assessment survey aimed at a broader training audience. Training facilitators may also decide to employ two or more methods to receive different perspectives. In the table below, various needs assessment methods are listed along with their relative complexity and accessibility (ease of use/time required).
Learning Needs Assessment: Methods and Information Sources

- Review and analysis of organisational policy, mission or mandate statements
- Review of existing job descriptions
- Short pre-course questionnaires (mailed or email)
- Individual interviews (either in person or over the phone)
- Consultations with trainees’ supervisors/superiors
- Consultation with people in key positions or with specific knowledge
- Review of literature and similar programs offered elsewhere
- Group/focus group interviews with trainees
- Direct observation
- Review of sample trainee reports or performance evaluations
- Analysis of job to determine the key tasks and skills required
- Formal surveys

Components of a Learning Needs Assessment Process

Think of a specific skill or knowledge that you possess related to your work at UNHCR. You have been given the task of visiting three field offices over the next two months to provide emergency training, support and advice in that area. What process or steps would you follow to determine the emergency training, support and advice to provide?

Regardless of the method used, all learning needs assessments should either explicitly or implicitly consider the four main components of the learning needs assessment process which are designed to:

1. Determine or identify the desired state of organisational and/or job performance.
   This step focuses on identifying the critical job tasks and competencies (knowledge, skills and attitudes) required to perform optimally in any given situation or position.

2. Obtain information and collect data about the current state of organisational, job and/or personal performance, including the current state of the trainees’ competencies (skills, knowledge and abilities).

3. Determine the gap between the desired or ideal situation and the current state. This gap should determine the needs, purposes and objectives of the emergency training, support and advice that is provided.

4. Consider what training, emergency support and advice option(s) you will employ to overcome or reduce the identified gap.
The figure below illustrates the components of this four-step process.

Identifying and overcoming gaps in knowledge, skills and abilities

1. Desired state of skills and knowledge
2. Current state of skills and knowledge
3. GAP between desired and current state
4. Emergency support and advice options
   - Mission to field
   - Staff mission/assignment
   - Reading/research
   - Distance education
   - Coaching, advising, mentoring OJT/TBT
   - Workshops

Assessing Trainee/Learner Competence and Knowledge

As a training facilitator, it is critical that you understand your learners and training audience. It is important to assess their performance and knowledge gaps as well as their awareness of their own level of competence or need for training and their particular learning style preferences.

Different people have different needs for information. Their needs will be based on their job descriptions, their own experience, and interpretation of their situations. A colleague’s need for advice, and the way it is offered, will change greatly as that person develops his/her own competencies and individual perspective on UNHCR, refugees, and emergencies. Whereas advising senior and experienced people in basic areas that they already know well will be met with disdain or even anger, advising junior colleagues in areas far beyond their experience or role may also be met with incomprehension or impatience if the material does not relate to their own understanding.

One system of classifying the degree of development of staff members in relation to particular areas of competence is called the ‘competence ladder’ of learning or staff development (Mink, Owen and Mink 1993). Each rung on the ladder implies one of four general stages of development. The only way to advance up the ladder is by spending some time at each level. The advice given to people at each rung of the ladder needs to be specific to their level of development. The four steps on the competence ladder are discussed below.
Level 1 — Unconscious Incompetence

The term ‘unconscious incompetence’ refers to the situation where the person to be advised is not aware that he or she needs advice. That is, the person is unaware or unconscious of the fact that there is a problem or training gap that needs bridging.

People at this level of competence need to be trained, but even more importantly, need to be made aware and accept that they need the training. This acceptance will be based on trust. If the trainee does not trust your experience or authority to provide the information he/she will not easily be swayed to accept your coaching.

Building trust takes time; however, there are several things that can be done to build acceptance and to shorten the time needed to establish a trusting relationship.

- Ask the person how he/she would advise you in his/her area of expertise.
- Explain that there are no ‘stupid questions’ and that any discussion about the topics to be trained is strictly confidential.
- Explain your intended approach and your reasons for choosing that approach.
- Try to establish a commitment on the trainee’s part to fully participate in the training/advising process.

Level 2 — Conscious Incompetence

The next step on the competence ladder is the situation in which an individual realises the need for more information or skill in order to perform tasks well. In this case the trainee has enough exposure to the problem or situation to realise his/her own shortcomings, but has not had the time or exposure to sufficiently learn the information/skill.

Describe one area in which you realise that you need more information or improved skill to perform a certain task well.

People at this level of competence should be eager to learn since they already understand their own need for training. These people will likely have some experience in emergency response or in contingency planning or other preparedness activities. Because of this limited experience, their questions and interests are likely to be very specific and based on their own experience. Some guidelines for effectively advising and coaching people at this level include.

- Ask them to describe their own experiences and highlight specific problems or they encountered or questions that they have.
- Listen carefully to their descriptions and questions and direct your advice to their situation rather than your own.
- Explain your experiences and then determine whether or not your advice seems to fit with their situation.
- Acknowledge the value of their experience.
- Provide resource material for further study or research.
Level 3 — Conscious Competence

This level of competence is achieved when people have learned the knowledge and skills necessary to carry out their tasks. Their grasp of the information, however, is not yet fully developed so they must actively think about what they have learned in order to apply it to the problem at hand.

People at this level of competence do not normally need advice on procedures or policy issues, but are likely to be very interested in operational dilemmas or areas of ‘art’ rather than the ‘science’ of emergency preparedness and response. The following guideline is for advising people at this level of competence.

- Compare and contrast your experiences with theirs
- Provide an opportunity for equal exchange of information and viewpoints
- Acknowledge their expertise.
- Question more than tell
- Analyse areas of their experience which they feel are inconsistent or unexplainable

Level 4 — Unconscious Competence

This is the highest level of competence. It is illustrated by people who have learned the information and/or skills needed to perform their tasks so well that they function efficiently ‘without thinking about it.’

People at this level do not need advice or coaching. They might, however, find an exchange of ideas with similarly experienced colleagues to be very supportive. Take advantage of coaching sessions with these people to capture their experience and skills and to synthesise lessons learned from their experiences with your own.

Assessing Learning Styles

Just as each individual exhibits different levels of competence, each individual also learns in a slightly different way. Some people accept theoretical advice easily and quickly test theories against their own experience. Others do not easily accept pre-formed theories or models, but appreciate facts, histories, and experiences on which to build their own theories and models. Once you understand the different learning styles and their application, you can begin to tailor your training and other advisory support activities to meet the style of the person needing the advice.

What are your preferred ways of learning new job-related tasks or skills?

Question
General Descriptions of Kolb’s Four Learning Styles

Dr. David Kolb, an organisational behaviour expert, developed the model shown here to identify the four basic adult learning styles.

Activists involve themselves fully and without bias in new situations. They enjoy the here and now and are happy to be dominated by immediate experiences. They are open-minded, not sceptical. This tends to make them enthusiastic about anything new. Their philosophy is: ‘I’ll try anything once.’ They tend to act first and consider the consequences later. Their days are filled with activity. They tackle problems by brainstorming. As soon as the excitement from one activity has died down, they are busy looking for the next. They tend to thrive on the challenge of new experiences but are bored with implementation and longer-term consolidation. They are gregarious people constantly involving themselves with others but, in doing so, they seek to centre all activities on themselves.

Reflectors like to stand back and ponder experiences from many different perspectives. They collect data, both first hand and from others, and prefer to think about it thoroughly before coming to any conclusion. The thorough collection and analysis of data about experiences and events are what counts so they tend to postpone reaching definitive conclusions as long as possible. Their philosophy is to be cautious. They are thoughtful people who like to consider all possible angles and implications before making a move. They prefer to take a back seat in meetings and discussions. They enjoy observing other people in action. They listen carefully to others before making their own points. They tend to adopt a low profile and have a slightly distant, tolerant, unruffled air about them. When they act, it is part of a wide picture which includes the past as well as the present and others’ observations as well as their own.

Theorists adapt and integrate observations into complex but logically sound theories. They think problems through in a vertical, step by step, logical way. They assimilate disparate facts into coherent theories. They tend to be perfectionists who will not rest easy until things are tidy and fit into a rational scheme. They like to analyse and synthesise. They are keen on basic assumptions, principles, theories, models and systems. Their philosophy prizes rationality and logic. ‘If it’s logical, it’s good.’ Questions they frequently ask are: ‘Does it make sense? How does this fit with that? What are the basic assumptions?’ They tend to be detached, analytical and dedicated to rational objectivity rather than anything subjective or ambiguous. Their approach to problems is consistently logical. This is their ‘mental set’ and they rigidly reject anything that does not fit with it. They prefer to maximise certainty and feel uncomfortable with subjective judgements and lateral thinking.

Pragmatists are keen on trying out ideas, theories and techniques to see if they work in practice. They positively search out new ideas and take the first opportunity to experiment with applications. They are the sort of people who return from management courses brimming with new ideas that they want to try. They like to get on with things and act quickly and confidently on ideas that attract them. They tend to be impatient with ruminating and open-ended discussions. They are essentially practical, down to earth people who like making practical decisions and solving problems. They respond to problems and opportunities as challenges. Their philosophy is: ‘There is always a better way’ and ‘If it works, it’s good.’
There are a number of forces that Kolb identifies which predispose individuals to adopt one or the other of these learning styles. These include the basic personalities of individuals—their educational histories, their professional careers, their current job roles and the specific, immediate tasks that they are working on. Although these forces may act to shift individuals between learning styles, the importance of previous choices in terms of education, career, etc. will tend to locate individuals in one of the four learning styles most of the time. It is possible, however, that our learning styles may change over time, based on our experiences and the learning context.

Kolb asserts that each of us has our own learning style, made up of a mix of the above four styles or modes. The above diagram helps us understand whether or not we are inclined first toward abstract theories (theorist) or toward concrete experience (activist), and second whether we are inclined toward active experimentation (pragmatist) or reflective observation (reflector).

When we are designing learning experiences for our trainees, we need to be aware of the various ways that adults learn and design learning experiences accordingly. The table below suggests some of the teaching and learning methods that best correspond to each learning style.

<table>
<thead>
<tr>
<th>ACTIVIST</th>
<th>THEORIST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practical exercises</td>
<td>Presentations by experts</td>
</tr>
<tr>
<td>Role plays and simulations</td>
<td>Theoretical/intellectual discussions</td>
</tr>
<tr>
<td>Case studies</td>
<td>Written documents</td>
</tr>
<tr>
<td>Task-based or on-the-job training</td>
<td>Theories and conceptual frameworks</td>
</tr>
<tr>
<td>Missions to the field</td>
<td>Distance education</td>
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<td></td>
<td>Independent reading and research</td>
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<table>
<thead>
<tr>
<th>PRAGMATIST</th>
<th>REFLECTOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modelling and demonstrations</td>
<td>Presentations by experts</td>
</tr>
<tr>
<td>Practical exercises</td>
<td>Group work</td>
</tr>
<tr>
<td>Action planning based on lessons learned</td>
<td>Observing/Shadowing expert</td>
</tr>
<tr>
<td>Task-based or on-the-job training</td>
<td>Missions to the field</td>
</tr>
<tr>
<td>Coaching</td>
<td>Coaching</td>
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<tr>
<td></td>
<td>Group discussions</td>
</tr>
<tr>
<td></td>
<td>Independent reading and research</td>
</tr>
</tbody>
</table>

The Learning Style Questionnaire in Annex B was developed by Dr. Peter Honey and Alan Mumford in order to help identify individual learning styles. It is reproduced here with the permission of the authors. You are encouraged to take the questionnaire to better understand your own learning style and the reality of the others. If you have a spouse, close friend or colleague who is willing, give this questionnaire to them and compare your responses to see how your learning styles differ and how they are similar. You may also want to use it as a needs assessment tool with your emergency response team.
Learning needs assessments help determine what type of emergency training, support and advice is required.

Learning needs assessments can help the trainer design a successful strategy, process or programme for providing emergency training, support and advice.

Methods for assessing learning needs include:
- Review of organisational policy, mission or mandate statements
- Review of existing job descriptions
- Short pre-course questionnaires (mailed or email)
- Individual interviews (either in person or over the phone)
- Consultations with trainees’ supervisors/superiors
- Consultation with people in key positions and with specific knowledge
- Review of literature and similar programs offered elsewhere
- Group/focus group interviews with trainees
- Review sample trainee reports or performance evaluations
- Analysis of job to determine the key tasks and skills required
- Formal surveys

The learning needs assessment should identify the learning or training gap by comparing the desired level of knowledge or performance with the present level of knowledge or performance of your trainees.

There are four levels of trainee competence. They are:
- Unconscious incompetence: Trainee is not aware of what he/she does not know and needs to know or learn
- Conscious incompetence: Trainee is aware of what he/she does not know and needs to know or learn
- Conscious competence: Trainee is aware of needed skills and knowledge but must consciously think about them to perform related task
- Unconscious competence: Trainee is competent in something without knowing it, or is able to function intuitively

There are four basic learning styles:
- Activist: Learns by doing
- Reflector: Learns by observing and reflecting
- Theorist: Learns through studying and understanding key models, principles or theories that integrate disparate facts and processes in a logical way
- Pragmatist: Learns by applying and refining concepts as they are practised
Chapter 3
Self-Assessment Questions

Check T or F to indicate whether a statement is True or False

1. It is important to recognise that most people learn in the same way.
   T  F

2. Unconscious incompetence refers to situations in which a person is unaware of what they know and are skilled at.
   T  F

3. ‘Activists’ as described in Kolb’s four learning styles are people who learn by implementation of ideas over time and long term consolidation and synthesis.
   T  F

4. ‘Reflectors’ prefer to ponder experiences and ideas and consider them from many different perspectives.
   T  F

5. One method of assessing learning needs is to interview the prospective trainees prior to the training event.
   T  F

Multiple choice. Mark ALL correct statements—more than one may apply.

6. Which of the following represent one of the standard levels in the ‘ladder of competence’ model:
   A Personal incompetence
   B Competent incompetence
   C Competent consciousness
   D None of the above

7. Conscious competence implies a situation where the person concerned:
   A is aware that they have the required skills or knowledge to do the job
   B is competent to carry those tasks that require no thought
   C is conscious of their incompetence
   D is conscious of their colleagues competence requirements

8. Which of the following steps are part of the learning needs assessment process
   A Surveying the training venue accommodations
   B Determining the gaps in knowledge and skills of your trainees
   C Determining or identifying the desired state of knowledge, skills or performance to be attained
   D None of the above
9. Which of the following is the learning style that Kolb uses to describe those who like to learn by doing:
   - A Activist
   - B Action theorist
   - C Distance learners
   - D Reflectors

10. Which of the following is the learning style that Kolb uses to describe those who enjoy learning by observing others?
   - A Passive observer
   - B Conceptualist
   - C Reflector
   - D Active observer

**Exercises**

A — You have been given the general task of visiting three field offices over the next two months to provide emergency training, support and advice on UNHCR policy issues concerning emergencies. Describe three different methods you could use to assess learning needs? Why would you use these?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

B — Describe the four components of the learning needs assessment process:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
C — Make a copy of the learning styles inventory in Annex B. Complete the learning styles inventory yourself and also administer it to a friend or colleague. Compare and discuss your responses and your results. Write a summary of what you discussed.

My two preferred learning styles:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

My friend's two preferred learning styles:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Discussion points:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

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________________________________________________________________________
Chapter 3
Answers

Exercise Answers

A — Three assessment methods: questionnaire administered via email, a phone call to field directors and participants, review what others trainers have covered for a similar situation.

B — First, identify desired state of performance. Second, identify current/actual level of knowledge, skill or performance of trainees. Third, assess the gap between desired and current or actual level of knowledge. Finally, based on an analysis of this gap, determine which staff development option(s) best meet the learning need.

C — Some issues to discuss include whether learning styles change over time and why; how the topic to be learned will influence our preferred style; how our educational and cultural experiences influence what style we value or prefer.
Better Support and Advice through Better Communication

By studying this chapter, you will learn about:

- The interpersonal skills required to be an effective training facilitator, coach or advisor
- Guidelines for asking questions and giving feedback
- Basic tips for using written/graphic communication aids

The best trainers and training facilitators have command of their content and have refined their communication and interpersonal skills, which facilitate the flow of their ideas to the learner. Without good communication skills, the ability to transfer information will be limited. Training facilitators need to have empathy for and patience with their advisees and be able to create positive, collegial learning atmospheres. Additionally, training facilitators must be adept at listening, asking questions, and giving feedback. Finally, training facilitators must recognise when it is important to support their verbal communication and presentations with appropriate written/graphic communication and training aids. Each of these skills will be discussed in this chapter.

Interpersonal Skills

Setting the tone and atmosphere for a coaching session or a small group discussion is often as important as what a training facilitator says and does in the session. Training facilitators must avoid thinking of themselves as the sole experts and the others as empty bottles waiting to be filled.

The Role of Learning Advisor

Training facilitators often must play the role of learning advisors. In this role, they must suggest and advise their trainees on options and methods for best learning what it is they need to know. To play this role well, training facilitators must try to establish a collegial atmosphere of mutual trust and respect with their trainees. When colleagues share the same organisational mandate and have the ability to draw on the need to accomplish the same goal, establishing such an atmosphere is simpler. International agencies such as UNHCR also need to achieve an atmosphere of acceptance and appreciation for a wide range of nationalities, ethnicities, and backgrounds. In all cases one must be sensitive to the issues of gender.
In your opinion, how is advising someone different from giving them directions or orders? What skills are required to be an effective advisor?

To be an effective training facilitator or advisor, one must understand that there are various levels of communication. One model consists of six different levels, shown here in order of ascending involvement on the part of the trainer or coach. Each level provides a foundation on which to ‘advance’ to the next level of communication and advising.

Each communication step is built on the foundation of the step below it. That is, advising without the benefit of first listening, understanding, questioning and so on, will result in delivering a directive, which is not the same as advising.

**Empathy**

Empathy refers to the ability to see or understand things from the other person’s point of view without having such understanding objectively and completely communicated. Take time to appreciate the situation that your colleague is in, his or her expertise as well as his/her anxieties about the topics you are discussing. This is only possible if you first take time to listen before telling.

**Patience**

Patience is a virtue, even in emergencies. This does not imply that slow decision making or chronic indecisiveness is appropriate, but rather that some things simply cannot be hurried. It does no good to simply tell someone what to do in an emergency situation without first establishing your credibility and authority and a relationship of trust and understanding.

Once the decision has been made to enter into an advisor/advisee relationship, take time to build a relationship in which the advice will be understood and accepted. Developing and maintaining an advisor or coaching relationship allows you as a coach to monitor the progress of your advisee, and allows your colleagues the chance to direct context-specific questions back to you as they arise.
Active Listening Skills

Active listening tells your learners that you are paying attention to them and allows you to tune in to their specific issues, challenges and viewpoints. In doing so, you can adapt and refine your teaching strategy for optimum effect. There are a few basic guidelines for becoming a better active listener:

Guidelines for Active Listening

- Focus on listening, not speaking
- Avoid interrupting
- Do not feel compelled to fill the silence
- Be interested and alert
- Seek areas of agreement
- Paraphrase
- Summarise and reformulate what you think the person is trying to say
- Withhold judgement until the speaker is finished
- Ask questions to clarify or check understanding

Asking Questions

If colleagues, either singly or in a group, begin to act restless, look bored, or show by non-verbal cues that they do not understand or disagree, you should ask questions to find out what is going on. To do this, the training facilitator must know how to formulate and ask questions. The way that a question is asked can greatly affect the mood and atmosphere of the session and the information you receive.

Asking open-ended questions should facilitate an analytical review of the situation by the trainee, and foster a non-threatening discussion about the topic. More detailed information is likely to be elicited and the answers might open new directions for the discussion.

Open-ended questions that begin with the words what, where, how, who, and when are likely to be very useful in clarifying the speaker’s intent and helping to facilitate a full description of the situation or idea. Questions that start with the word why may cause the advisee to become defensive and may even limit or stop the discussion. The word why is often construed as a thinly veiled attack or critique, as it implies that you cannot understand why a person would do or say such a thing.

Four Basic Types of Questions

- General questions elicit a broad range of potential responses, such as:
  - What are the goals of emergency management?
- Specific questions focus on an idea with a limited range of responses, such as:
  - What basic foods are typically provided to refugees in camp situations?
- Overhead questions are asked of a group, allowing volunteers to respond, such as:
  - Who can tell me what the death rate is an indicator of in a population?
- Direct questions are directed to a specific person with the intent to elicit an explicit answer, such as: What daily wage rate did you use to calculate this budget?
Providing Emergency Support and Advice

General and overhead questions are less threatening and therefore better to start a discussion, especially with a group that you do not know well. Direct and specific questions are best used after colleagues become comfortable with group discussion, and after you better understand their level of skill or experience related to the discussion topic.

Questions to Avoid

Unanswerable questions — Be sure that the questions you ask can be answered by the group or by some member of the group.

Closed-ended questions — These refer to questions that elicit answers of simple assent or dissent. Unless followed by other questions of the why, when, where, how, what, who sort, a ‘yes’ or ‘no’ answer leads nowhere.

Vague, indefinite, ambiguous questions — To get satisfactory answers you must ask good questions. Sometimes you may need to rephrase your question or break it down into sub-questions if not immediately understood. Above all, avoid trying to trap a trainee into an incorrect or misleading answer.

Witness box interrogation — You may have to ask a trainee several questions in the interest of clarification, but your conduct should never be that of a courtroom cross-examination where the person answering feels threatened.

Giving Feedback

A very important training skill is the ability to give appropriate and timely feedback. People learn and grow when they receive confirmation on specific things they are doing right, and constructive feedback on the exact things they need to improve or change. When providing feedback remember to:

♦ Give feedback with the aim of helping—not judging
♦ Be specific and give concrete examples—avoid generalising
♦ Balance constructive criticism with recognition of what is being done right
♦ Continually provide positive reinforcement and encouragement
♦ Acknowledge and build on the trainee’s strengths

In general, people will strive to improve if they have a sense that they are competent and successful. While we need to point out what specific things they can improve and give specific suggestions for doing so, it is also very important to remain positive and encouraging.

Use of Written/Graphic Communication Aids

Not all communication is spoken. While body language and hand gestures communicate additional meaning to our words, simple graphic devices can communicate even more. Trainers should identify and prepare written and graphic material to aid them in communicating a point and to leave as a reference with their trainees. For many types of work, graphic guidelines or rules of thumb can be made and left with the learner for future reference, or as a training device to use until the information becomes more routine. These are especially helpful for some emergency preparedness and response activities that are fairly routine and can be simplified to reference material for others who may not carry these actions out on a regular basis.
Think of a coaching or training assignment that you may be asked to complete in the future. List the reference materials and graphic aids that you can use in your presentation or leave with your trainees.

Concise notes or diagrams on the use of radio equipment or preparing emergency situation reports are examples of the types of references that could save valuable time and reduce costly errors for novices who suddenly find themselves confronted with new procedures in the face of an emergency. Different types of written, analytical or graphic guides and tip sheets are described below.

**Procedure Tables**

Procedure tables reduce complex activities to their component steps or sequence. These are commonly attached as part of operating instruction manuals accompanying equipment or software for computer-based programmes. This kind of guide should be labelled, reflecting the overall procedure or activity being described. The material can be presented as a table listing the steps to take in sequence. These tables are simple to construct and very useful for those who are not accustomed to the activity or procedure being described or for procedures which are seldom used and therefore are likely to be forgotten.

The UNHCR Unaccompanied Minor Registration Form, for example, lists the procedures that should be followed to complete the form (UNHCR *Handbook for Emergencies*, p. 114).

**Completing the Unaccompanied Minor Registration Form**

<table>
<thead>
<tr>
<th>STEP</th>
<th>PROCEDURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Write names of brothers &amp; sisters who are with child.</td>
</tr>
<tr>
<td>2</td>
<td>Find out the name and location of persons who found or brought child to current location, interview that person and record that information.</td>
</tr>
<tr>
<td>3</td>
<td>Interview any other adults &amp; children who may have information on child’s family and record that information.</td>
</tr>
<tr>
<td>4</td>
<td>Write down any visit the child receives: date, name and address of visitor and relationship to the child.</td>
</tr>
<tr>
<td>5</td>
<td>Record child’s movements: date and places: e.g. hospital, nutrition centre, etc. and final move for family reunion or other reasons.</td>
</tr>
</tbody>
</table>

**Preparing ‘If-Then’ Tables as Learning Aids/Guides**

‘If-then’ tables are simplified guides or reminders that can be used to help make decisions about procedures or specific steps within unfamiliar processes or protocols. These tables must be specific and focused on narrow topics or within very narrow guidelines to be effective. In other words, the specific context must be described as a basis on which the directives offered will be correct. The following example provides guidance on selective feeding programmes. The model may be applied to almost any situation as long as it can be described explicitly.
Guidance on Selective Feeding Programmes

<table>
<thead>
<tr>
<th>IF</th>
<th>THEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malnutrition rate 15%</td>
<td>Blanket supplementary feeding programme</td>
</tr>
<tr>
<td>OR</td>
<td></td>
</tr>
<tr>
<td>Malnutrition rate 10-14% in presence of aggravating factors*</td>
<td>Therapeutic feeding programme</td>
</tr>
<tr>
<td>Malnutrition 10-14%</td>
<td>Targeted supplementary feeding programme</td>
</tr>
<tr>
<td>OR</td>
<td></td>
</tr>
<tr>
<td>Malnutrition 5-9% in presence of aggravating factors*</td>
<td>Therapeutic feeding programme</td>
</tr>
<tr>
<td>Malnutrition rate &lt; 10%</td>
<td>No need for population level interventions (individual attention for malnourished through regular community services)</td>
</tr>
<tr>
<td>OR</td>
<td></td>
</tr>
<tr>
<td>Malnutrition rate &lt; 5% in presence of aggravating factors</td>
<td></td>
</tr>
</tbody>
</table>

* Aggravating factors: general food ration below the mean energy requirements, crude mortality rate >1 per 10,000 per day, epidemic of measles or whooping cough, high prevalence of respiratory or diarrhoeal diseases.


Procedure Diagrams

Procedure diagrams are graphic representations of decision chains or procedures that allow taking different paths based on decisions made. They are a combination of the two aids already discussed as they have elements of both procedure tables and ‘if-then’ questions and decision points. These charts are good for describing operations or procedures when the context is less well known than is needed for a straightforward procedure chart. A good example of a procedure diagram (shown on the next page) is taken from the UNHCR *Handbook for Emergencies*, p. 235.

Rule and Example Sets

This type of guide or reminder is most useful in situations where written examples can serve as patterns to follow, for example, how to complete a form, report, or other written document. The guide consists of a written explanation followed by an exact (if possible) replica of the report or form entry. Where appropriate, these simple tools are excellent coaching and/or advice aids. They require that you carefully think through the steps of an activity. By creating the simplified form, you test your own analysis, thereby pre-testing it before trying to explain it to someone else. Also, the tool, if well made, will last long after your discussion ends.

How to Fill in the Registration Data for New Arrivals

**Rule:** In the entry field, the last name comes first, the first name second, then the 7 digit date of birth (mm/dd/yy)

**Example:** GOOD – JAMES – 09/03/58
Discuss problems with refugees, government officials, NGOs, etc.
Assess available resources
Immediate action: localize excreta away from dwellings and water supply

Sample Procedure Diagram

- Hot, dry climate?
  - YES: Identify and designate areas for defecation
  - NO: Excreta must be contained: cover it with soil if possible, pending a better solution

- Rocky soil?
  - YES: Raised latrines (VIP, VIDP)
  - NO: Excreta must be contained: cover it with soil if possible, pending a better solution

- High water table, flooded or marshy ground?
  - YES: Must go direct into watertight or raised container, e.g. VIDP unit
  - NO: At least ensure raised structure to separate defecator from marshy ground

Choose most appropriate wet system, e.g. pour-flush toilets or dry system

Is water nevertheless available and used by refugees?
  - YES: Choose most appropriate wet system, e.g. pour-flush toilets or dry system
  - NO: Bury excreta:
    1) Deep trench — simplest
    2) Appropriate family latrine — better e.g. ventilated improved pit, borehole, VIDP latrines
Training facilitators must have good interpersonal and communication skills, as well as content knowledge.

The creation of a collegial atmosphere of mutual trust and respect is vital for establishing a relationship in which one person can effectively advise another.

Before giving advice, a coach or advisor needs to build a collegial atmosphere and understand the specific problem or challenge facing their advisees.

Active listening is an essential skill for training facilitators. Several active listening tips are provided in this chapter.

Training facilitators need to be adept at asking questions that facilitate analytical review of the lesson, and foster a non-threatening discussion about the topic being discussed.

There are four basic question types:
- General, which elicit a broad range of potential responses
- Specific, which focus on an idea having a limited range of responses
- Overhead, which are asked of a group allowing anyone to respond
- Direct, which are asked directly to an individual to elicit an explicit answer

Questions to avoid if you are trying to generate discussion:
- Unanswerable questions
- Questions of simple assent or dissent (closed-ended questions)
- Vague, indefinite or ambiguous questions
- Witness box interrogation

Feedback should be specific, and reflect a balance between constructive criticism and positive reinforcement of what trainees are doing well

Training facilitators should identify and prepare written and graphic material to help communicate their message and to leave as a reference with their trainees.
Chapter 4  
Self-Assessment Questions

Check T or F to indicate whether a statement is True or False

1. Procedure tables simply reduce complex activities to their component steps or sequence.  
   | T | F |

2. Procedure diagrams graphically represent possible decision chains or paths within procedures that require choices within the activity being analysed.  
   | T | F |

3. A training facilitator should refrain from creating a collegial like atmosphere with their trainees  
   | T | F |

4. Direct questions are generally less threatening than general ones.  
   | T | F |

5. When giving feedback, provide general suggestions and focus only on what can be improved  
   | T | F |

Multiple choice. Mark ALL correct statements—more than one may apply.

6. An ‘if-then’ table should be:  
   | A | B | C | D | E |
   | Very specific | Very general | Designed to allow for user interpretation | Elicit principles applicable to different situations | Narrow in scope |

7. ‘Rule and example sets’ are useful in situations where:  
   | A | B | C | D | E |
   | The action concerned is completion of a form, report, or other written document | There are many possible interpretations of the questions | Practical application of management and team building skills is required | New procedures must be designed within a set time period | None of the above |

8. Some useful tips for giving feedback include:  
   | A | B | C | D |
   | Balance constructive criticism with positive reinforcement | Acknowledge and build on the trainee’s strengths | Provide broad generalisations of the trainee’s performance | All of the above |
9. Guidelines for active listening include:
   - A. Speak as much as possible to show your trainee that you are engaged in the conversation
   - B. Interrupt your trainee often to let them know that you are listening to what they are saying
   - C. Paraphrase what the other person is saying
   - D. Ask questions to clarify or to check understanding

10. Which of the following type of questions refers to questions which are asked of a group as a whole and allows for volunteers to respond:
   - A. Direct questions
   - B. Specific questions
   - C. Overhead questions
   - D. Detail questions

Exercises

A — Imagine that you are to lead a discussion on ‘emergency preparedness’ with a small group of trainees. In the space provided, and for each category of question noted, write two questions that you could ask your trainees:

Open-ended questions

Closed-ended questions

General questions

Specific questions
Overhead questions

Direct questions

B — In the space provided, design your own procedure diagram for a process, procedure, or activity that you know well. Practice explaining it to a friend or colleague and monitor how well he/she understands it. Re-examine and revise your diagram after this discussion—concentrate on areas that were either unclear, or misunderstood.
Chapter 4
Answers

Exercise Answer — A

Open-ended: What experience with emergency preparedness do you have?

Closed-ended: Were you involved in the Goma emergency?

General questions: What are the goals of emergency management?

Specific questions: What basic foods are typically provided to refugees in camp situations?

Overhead questions: (Posed to the group) What is the death rate indicator of an emergency situation?

Direct question: John, please tell me what table you were using to calculate the death rate?

Exercise Answer — B

Compare your procedure table with the one found in this chapter.
Emergency Preparedness Competency

Practical Applications

Trainees at a UNHCR Emergency Management Training Programme workshop in Addis Ababa, working on a group exercise.

InterWorks, 1997
Check T or F to indicate whether a statement is True or False

1. The best coaches are those that take control of the coaching session, directing and instructing their coachees in a task or skill.

2. An evaluation conducted one-to-two weeks after the training event is often used to determine the impact of the training on personal and organisational performance.

3. When presenting technical information to generalists, it is best to explain the importance of the information as it relates to wider crosscutting issues.

4. Coaches who have strong teaching skills but who are weak in the content of the material to be taught are considered to be expert practitioners but are not necessarily expert coaches.

5. To establish your credentials as a coach, it is generally better to avoid answering a trainee’s question than to admit ignorance when you don’t know the answer.

6. In comparison to a workshop trainer, coaches tend to have more control over the teaching and learning goals and the content to be taught.

7. When conducting a training evaluation, it is often very difficult to account for the influence of non-training factors on personal or organisational performance.

8. The ‘light-house’ presentation technique refers to scanning the audience with your eyes, from side-to-side.

9. ‘Sign-posts’ refer to the main ideas and points that the speaker has written on notecards to help him/her recall what needs to be said.

10. Presentations should be used when you must present many ideas and much detail in a very short time.

11. When speaking to a large group, you should speak louder and faster than normal.

12. Trainees should be allowed to help determine the goals and priorities for a training workshop.

13. It is generally advisable to schedule in the afternoon those sessions which are most intensive and require the clearest thinking.
14. Involving participants in studying and analysing case studies is an effective way to build their problem solving skills.

15. In general, the use of simulations and role-plays as teaching methods is not recommended during emergency management workshops.

16. The responsibility for setting up the training room and arranging the seating to create an atmosphere conducive to learning is primarily the responsibility of the venue managers, not of the workshop trainer.

17. During workshops, trainers should plan to use different types of teaching methods.

18. The length of most workshop sessions should be limited to no more than 140 minutes.

19. Workshops are relatively inexpensive and require little preparation or organisation.

20. To encourage participant interaction and team building, participants should be seated in a traditional classroom seating arrangement, in rows, all facing the front of the room.
Coaching

By studying this chapter you will learn about:

- When coaching is appropriate
- Eight elements of successful coaching
- Specific techniques for coaching effectively
- How to build your repertoire of coaching skills and information

Description of Coaching

Coaching, advising and mentoring are similar functions and generally refer to one-on-one teaching and learning situations aimed at raising an individual's current level of skills, ability and overall performance. In many ways, these types of staff development efforts are the most flexible in meeting individual needs since learners can actively shape the coaching to their needs and the coaches can change methods, timing, and informational priorities on the spot. Each, however, has a slightly different emphasis.

Coaching implies a coach who gives advice and feedback on performance over time, in a planned way with the same individual. Coaching is also used to prepare someone for specific activities or offices.

Advising typically carries the loosest of the three associations where advice may be casual, or only offered in passing.

Mentoring implies the closest relationship of the three, where a mentor (usually not the supervisor) helps guide a less qualified or experienced colleague through the organisational ‘ladder’ on an ongoing basis.

The remainder of this chapter discusses the elements and skills for effective coaching. Since coaching implies the broadest concept and makes use of advising and mentoring skills, most, if not all, of this discussion is also relevant for successful advising and mentoring relationships.

Appropriate Coaching Medium or Venue

Coaching sessions can be planned or impromptu. Coaching sessions can be scheduled when planning site visits to the field, to coincide with an appraisal meeting, or during a scheduled orientation period for a new staff member. Impromptu opportunities can occur anytime, including: when you are asked for advice, when you are asked to help someone do something, when a colleague or assistant tells you they cannot do something, when you see that a task or procedure can be done more efficiently or effectively, or when mistakes are made. In addition to face-to-face meetings, you can provide coaching support via email and the telephone—these two mediums are especially useful for
Providing Emergency Support and Advice

follow-up coaching support. Organising and running small sessions where two or more people are to be trained together is another way of offering support and advice in a cost-effective way. The ‘CLAM principle,’ that Coaching and Learning can happen at Any Moment, is especially useful to remember as a coach. Indeed, coaching and learning can happen any place and at any time between a supervisor and his/her staff, between two colleagues and between an assistant and his/her boss.

One question that needs to be asked is, ‘If effective communication and therefore advising and coaching can be done via written words and graphics, why does a coach need to talk to a colleague in order to better support him or her? Why not simply write a letter?’ In some instances, this may be appropriate. In many, however, the issues discussed are simply too complicated or must rely on the colleague’s questions and feedback as well as on the coach’s experience and insight.

‘Managers and associates should also be able to establish guidelines for determining when a communication can be handled in writing, when it can be handled on the telephone, and when it must be handled in person. For instance, they might choose to adhere to the one-page rule: If an idea or direction can’t be explained clearly and thoroughly in a single page, then it should be discussed person to person (either over the phone or on site). A corollary rule might be the half-hour rule: If an idea or direction can’t be explained clearly and thoroughly in a half-hour phone call, then it should be discussed face to face’ (Mink et al. 1993, pp. 242-243).

Elements of Successful Coaching

For coaching to be successful, the following essential elements must be present:

♦ Competent coach
♦ Open and willing coachee
♦ Common language
♦ Transfer of knowledge, skills, or attitudes
♦ Assimilation and application
♦ Feedback
♦ Review and evaluation of learning

Competent Coach

Not everyone is qualified to be a coach in the area of emergency preparedness and response for mass displacement emergencies. Knowledge about the intricate relationships between sectoral areas within an emergency response as well as in-depth knowledge about the organisational culture of UNHCR and partner agencies is extremely important. But, experience and knowledge are not enough. The skilled coach, advisor, or trainer must also have strong communication and training skills. The diagram shows the way these two dimensions of coaching are related to one another.

This course should help you improve your facilitation and coaching skills. Basic knowledge about emergencies and preparedness issues must be learned through direct experience or other specialised training programmes. Other distance education programmes on related topics in this series are:

EP-01 Contingency Planning
EP-02 Planning an Emergency Response
EP-03 Managing an Emergency Response
EP-04 Managing External Relations
If you are relatively unskilled as a training facilitator or coach, completing this training module should help you become a better facilitator, but practice is essential. Using the insights and key points from this course in your next training or advising session should give you more confidence and help you better prepare others for work in emergency preparedness and response. If you are an experienced practitioner but not a skilled coach or trainer, this module will help you become a qualified coach. If you are already a qualified coach, this module may offer additional insights.

**Sense of purpose or mentoring goal** From the outset, it is important to understand the end result or impact that is expected of your next coaching, advising, or training assignment. The more clear your own goals for the session, the more likely it is that your advice or support will be understood, appreciated, and applied. If you are responsible for arranging or managing a programme of coaching, your goals should be made known and discussed with the coaches and coachees.

In the area of emergency preparedness and response, the ultimate goal is the reduction of human suffering and the preservation of life. Coaching and support given to colleagues must be done in order to help move them, and thereby the whole organisation, in the direction of more success in carrying out the organisation’s mandate.

**Assess coachee’s competency** When a coaching opportunity surfaces, most of us want to immediately begin instructing and telling others what to do, or how to do it. As coaches, we must avoid this temptation. The first step, as discussed in Chapter 3 on learning needs assessment, is to uncover what your learners already know or have tried. For example, you might want to begin your coaching session by asking coachees, ‘How do you address this problem normally?’ or to ‘Show me what you have tried so far.’

As discussed in Chapter 3, an understanding of the basic types of learning styles will help coaches match their training style and approach to the learning styles of their colleagues. A successful coach will also consider the coachee’s specific background, experience, and position in the organisation when preparing for coaching. An understanding of the person’s outlook and existing knowledge is critical if he/she is to be influenced by the coach in a positive way.

**Open and Willing Coachee**

Coaching relies on a relationship between a competent coach and a willing coachee. The coach can succeed in transferring knowledge, skills and advice only to the extent that the coachee is a willing and open learner. If someone does not want to be coached, there is little a coach can or should do to ensure learning. Indeed, coaching works best when it is voluntary for both the coach and coachee.

**Question**

*Why might some individuals have a negative attitude toward coaching or resist being coached?*
The ability to accurately identify those in need of coaching and support is critical to a coordinated coaching programme. Some method must be in place to identify those that need coaching, or for individuals to indicate a need for coaching. In many cases, this may be a rather sensitive issue.

If potential coachees think they are being punished or that they may experience negative consequences as a result of coaching, they will resist the experience. In some cases, the management solution is to institutionalise coaching on a wider basis, simply to assure acceptance by those who actually need it. The coach as well as the entire organisation must work to portray coaching as a positive step for staff that want to improve their performance.

**Common Language**

Common language means more than simply speaking the same national language or local dialect. It also includes the particular jargon or language of the organisation and of emergencies. To make the message understandable, the coach must be able to assess the gap between his or her own common language and that of the trainee. Effective coaches adjust their own vocabulary and language according to the words and concepts that their coachees use to describe or represent their reality.

Coaches can improve their use of language by applying the basic communication skills presented in Chapter 4 and asking for constructive feedback from those being coached. Within the UNHCR system, coaching should be a straightforward exercise as staff will likely have the same understanding of the terms being used.

**Transfer of Knowledge, Skills, or Attitudes**

The coach must have the knowledge or skills that need to be transferred. This knowledge may be based on direct experience in dealing with the problems that the trainee is currently facing, or on insights into the same areas as a result of related experiences.

**Knowledge of the organisational culture and norms**

Another critical element of coaching or advising within an organisation is the necessity to provide advice in a way which is ‘in step’ with the operational norms of the agency. The advantage of the coach or internal advisor over outside consultants or facilitators is that this specific knowledge can be freely discussed and evaluated within the day-to-day functioning of the organisation or agency. Take time to better understand your organisation and its working norms along with the more technical areas of emergency management. Incorporating this into your coaching sessions will have a very positive benefit for your colleagues.

**Understanding the Coachee**

Awareness of cultural and gender diversity is essential if the transfer of knowledge, skills and attitudes is to be successful. This includes awareness on the part of the coach of gender- and culturally-based biases that he/she may bring to a coaching session as well as knowing about the biases of the coachee. If the coach and coachee bring very different gender (or culturally-based) biases to their sessions without having a clear understanding of these differences, key areas of information may be misinterpreted, or friction between them may limit discussion and learning. If the coach and coachee share very similar gender and culturally-based viewpoints or biases, some aspects of the situation may simply be overlooked as their mutually reinforced notions will tend to foster reaching conclusions without full analysis or discussion.

**Technical knowledge/content**

If you have been asked to be a coach, you have likely been chosen to provide advice or other support based on your own expertise in preparing for and responding to humanitarian emergencies. As a coach, it is your duty to expose others to your experience and the lessons you have learned as well as to refer them to relevant emergency-related reference materials.
(see Chapter 3 for a partial list). Do not represent your own experience as greater or more in depth than it actually is in order to impress or persuade your colleagues. It is just as important to acknowledge ignorance on points that are not clear to you as it is to share insights in areas where you have learned important lessons.

In the sectoral areas, particularly, there is a resistance on the part of technical experts to talk about methods, techniques, or ‘best practices’ to others who are not trained technicians. There is a fear that untrained people will use ‘a little knowledge’ to do a lot of harm. While there may be some basis to this idea, the larger reality is that more harm is done out of ignorance than out of knowledge mis-applied. In order to safeguard against this possibility, however, a few guidelines for technicians advising generalists may be helpful:

- When presenting technical points to generalists, explain the importance of the point as it relates to wider crosscutting issues. Do not just explain the specifics or highly technical aspects of isolated activities in your special field.
- Make it clear that technical points, particularly explanations of ‘best practice,’ should be used by managers and generalists to question and monitor technical activities, not to carry them out.
- Explain technical points to generalists with an end view or coaching goal of widening their experience, not of perfecting their technical skills.
- Explain the warning signs that indicate when generalists should immediately call for expert assistance.
- Do not avoid explaining technical areas, but keep it simple. Prioritise your discussion to the points that non-technical persons need to know—the idea is not to prove your superior expertise, but to round out the information that others need to better prepare for and respond to emergencies.

Sharing your own experience and your own views means that you must expose your own beliefs regarding your area of expertise. In the field of emergency preparedness and response many of the lessons to be learned concern policy, politics, or ‘art’ rather than hard science or concrete facts. Even the discussion of seemingly scientific data such as the minimum nutritional daily requirements or the number of litres of water which should be provided on a daily basis may have deep political, sociological or management meanings far beyond the ‘scientific’ merits of the questions.

In such areas the coach must use the first person pronoun as appropriate, for example, ‘I believe that’ or ‘In my experience, I have always found it safer to …’ Rather than weakening the message, your belief along with the recognition that the question may have other appropriate answers is transferred to the learner.

**Personal experience in emergency operations** The coach or advisor relies on his or her own experience. This is fair and fundamental, but it is not enough. An uncritical and unfiltered transfer of one’s own experiences is not necessarily helpful to those who may find themselves in related but dissimilar situations. The advisor must be able to relate such experiences to the learner’s current reality and anticipated future situations. Principles must be extracted from experience and applied to new situations in ways that support the learner’s needs.

**Assimilation and Application**

Successful coaching involves more than just transferring knowledge and skills from coach to coachee. The coachees must also assimilate and be able to apply what they have learned. The coach should not ask, ‘Have I taught everything that I came to teach?’ but rather, ‘Has the coachee learned
everything that they wanted to, or needed to learn?’ This second question when answered affirmatively is much more meaningful.

The coach can verify that the coachee is assimilating the information by observing him/her complete a relevant task, posing questions which confirm knowledge assimilation, or formulating problem situations for the coachee to solve. When building specific skills like ‘the ability to facilitate a contingency planning meeting,’ you might actually observe the coachee facilitating such a meeting after having provided the necessary information, tools and advice. The coach should design and involve the coachee in many practical and real applications of the information and skills that are being transferred.

**Giving Useful Feedback**

The coach should constantly be giving the coachee both verbal and non-verbal feedback on his/her performance. Feedback is simply a constructive and positive way of informing others how they are doing. It is aimed at building the coachees’ confidence, identifying what they are doing right and discussing what still can be done to improve their performance. Feedback should:

- ✔ Be specific and related to observed behaviour or action (I noticed that you were …)
- ✔ Focus on the behaviour or action, not on the person (I observed you …)
- ✔ Be positive and constructive (What if we tried doing this by …)
- ✔ Encourage alternatives (How else could you …?)

After a coaching session, the coach can give the coachee feedback by describing three or four things the coachee did right and offering one suggestion for improvement. Feedback aimed at building the coachee’s confidence can be as simple as saying, ‘Well done,’ or ‘You seem to be catching on quickly.’

Effective coaches not only give feedback to their coachees, but also ask for feedback on how they are doing as coaches. Simple questions a coach can ask include, ‘What seems to help you the most?’ or ‘How do you prefer that I help you?’

**Review and Evaluation of Learning**

At the end of his/her coaching session, coaches should determine a process or activity that will help the coach evaluate and the learner review what the coachee has learned. Ideally, this review is not a delayed and distinct event, but is planned as part of the coaching process itself. One of the best ways to do this is to give coachees a practical problem or situation that requires application of what they have learned. A more formal evaluation to determine coaching impact, if needed or required, can be completed as a follow-up activity. Chapter 8 discusses the types and uses of evaluation in more detail.

Impact evaluation may be possible if baseline indicators about performance can be set before coaching begins and measured again some time after the process has been completed. For ongoing relationships, observation or measurement may be made at regular intervals.
Coaching is perhaps the most flexible of training options since learners can shape the session to meet their needs and the coach can change methods and information priorities on the spot.

Elements for successful coaching include:
- A competent coach
- An open and willing coachee
- A common language
- A transfer of knowledge, skills or attitudes
- Evidence of coachee assimilation and application
- Giving feedback
- Review and evaluation of learning

The coach as well as UNHCR must portray coaching as a positive step for staff that want to improve their knowledge or skills. If coaching is seen negatively, as a ‘punishment’ or remedy for bad performance, it will be resisted.

Coaching sessions can be planned or can occur impromptu.

Coaching sessions are not complete until the coachee has an opportunity to apply or practice what he/she has been taught.

One can build technical knowledge for coaching by reading and referring to training material and other competency modules.

When offering advice or an idea that is clearly the coach’s opinion and not standard policy or practice, the coach needs to clearly state that this is so. For example, the coach can preface such statements with, ‘Well, in my experience …’ or ‘I believe that …’
Chapter 5
Self-Assessment Questions

Check T or F to indicate whether a statement is True or False

1. Expert facilitation and communication skills are more important than experience or content expertise on the part of the coach.
   T    F

2. The best coaches are those that take control of the coaching session, directing and instructing their coachees in the task or skill to learn.
   T    F

3. Since coaching is really about teaching and helping others improve performance and knowledge, it will always seen in a positive light by those being coached.
   T    F

4. The most effective coaches will teach any two learners in the same way if the content to be taught is similar.
   T    F

5. Coaching sessions are completed when the coach is satisfied that s/he has taught or shared all of the content or information that s/he had planned to share.
   T    F

Multiple choice. Mark ALL correct statements—more than one may apply.

6. What does the CLAM principle mean:
   A. Coaching and Learning Are Mandatory
   B. Coaching and Learning can happen at Any Moment
   C. Critical Lessons And Manuals are important to provide the coachee
   D. None of the above

7. When giving feedback, it is important to:
   A. Provide general comments
   B. Limit the alternatives and options on how to do something
   C. Be positive and constructive
   D. All of the above

8. Which of the following is the best way to verify that the coachee has assimilated what he/she has learned:
   A. By asking the coachee to complete an exercise or task related to the coaching material being taught
   B. By making sure that the coach is prepared
   C. By asking the coachee to repeat verbally what has been taught
   D. By asking the coachee to observe the coach complete the task and ask questions
9. If a coach is asked a difficult technical question and is uncertain of the answer, she should:

A. Direct the question back to topics she is more familiar with
B. Express her opinion convincingly and state it as fact
C. Give her opinion, explaining her uncertainty and making it clear that others likely have other opinions on the subject
D. Ignore these questions and continue with her planned presentation

10. When presenting technical points to generalists, it is best to explain:

A. The importance of a point as it relates to a narrow technical issue or detail
B. The importance of a point as it relates to wider cross-cutting issues
C. The technical details of specific activities to be done in the field
D. That the technical points are of no consequence

Exercise A

Based on your own experience in emergencies, anticipate a coaching session that you might be involved in. Prepare a list of what you can do and what documents or training materials you can read that will help you prepare for such coaching. Request these documents from UNHCR and schedule time to review them.

Exercise B

What specific UNHCR emergency operation evaluations might be useful for your coaching sessions?
Chapter 5 Answers

1. F  6. B
2. F  7. C
3. F  8. A
4. F  9. C
5. F  10. B

Exercise Answers

The answers to these questions will depend on the topic you chose. You may want to refer to the list of emergency-related references in Chapter 3 to make sure that you have not forgotten a useful reference.
Making Presentations

By studying this chapter you will learn about:

- The five main elements of effective presentations
- Various effective verbal and non-verbal communication techniques
- Some guidelines for opening your presentation
- Key aspects of preparing, planning and practising your presentation
- Different methods for engaging your audience and maintaining their attention
- How and why to use ‘sign-posts’ in your presentation

On occasion, you may be asked to make formal presentations based on your knowledge and expertise of emergency preparedness and response. For example, you may need to present the value of and procedures for contingency planning to a group of government counterparts and local NGOs in the field. Or, you may be asked to make a presentation at a meeting of UN agencies and NGOs on the best ways to co-ordinate emergency response operations. In these situations, you must possess not only the knowledge but also the communication skills to deliver your message successfully.

Think a moment about formal presentations you have made and that you might be asked to make in the future. List them here and keep them in mind as you read the rest of this chapter.

Presentations are useful when time is limited, when your training audience is large, and when most, if not all, of the content is new to the audience. Presentations can be used to transfer information, or better yet, to motivate and inspire your audience to a particular course of action, or convince them of a particular point of view. In this chapter, you will learn useful tips and guidelines aimed at improving your presentation skills.
Consider your list of formal presentations. What are some techniques that you use, or have heard that a presenter should use, to make effective and dynamic presentations (e.g. maintain eye contact with your audience)?

There are five basic elements of effective presentations. The acronym ‘COPES’ is useful in helping you to remember each of the elements.

- **C** = Communicating effectively
- **O** = Opening successfully
- **P** = Planning, preparing and practising
- **E** = Engaging your audience
- **S** = (Using) Sign-posts and summarising

The rest of this chapter considers each of these elements, and provides practical guidelines for doing each well.

**C = Communicating Effectively**

Presentations are used to communicate to your audience an important idea, strategy, concept or vision. Effective communication, however, is much more than just verbally presenting the content of your speech. It is also about engaging your audience, having empathy for them, knowing what content to emphasise, and choosing what to say.

**Communicating Content**

Presentations should communicate a few simple and big ideas, goals or concepts; inspire your listeners to action; or emphasise the most critical elements of a strategy, process or procedure. Presentations should rarely, if ever, be used to transmit complex and detailed information, as this will often confuse, tire and bore your audience. Leave the complexity and the details for the discussion session to follow your presentation or include them in a report that you can distribute after your speech. In a 20-minute presentation, no more than three or four major ideas should be presented. Use stories and anecdotes to illustrate and support your main points.

Be flexible. Especially for small groups, it is quite easy to misjudge the level of expertise or experience of the group prior to the session. If you discover that the participants are well advanced in your topic area, do not waste their time by telling them things they already know. Rather, let them tell you what they know and discuss only problem areas or issues that they are interested in.

**Non-Verbal Communication**

Communicating effectively also requires attention to non-verbal means of communication. You need to show enthusiasm or passion for the topic throughout your speech. You also want to establish and maintain eye contact with your audience. Some presenters do this by ‘locking-eyes’ briefly (for two seconds) with participants throughout the meeting room. Others will do this by using the ‘light-
house’ technique, where they slowly scan the audience from side to side—holding eye contact with people on one side of the room and then slowly moving their eyes to the other side of the room. Many presenters use a combination of both techniques. The key is to keep your eyes and focus on your audience, not on your notes or your overheads. This communicates that you are attentive and that you care about your audience.

Your body also communicates messages to your audience. Stand up straight in an open and relaxed position. This will communicate confidence and ease with your topic. Likewise, always face your audience. At times, it may be appropriate to walk towards your participants to emphasise a point or to regain their attention. Avoid pacing or weaving back and forth nervously—as your audience will be more attentive to your motion than to your message. You should also keep your hands free of paper and pens, which can be distracting if they are shuffled or played with.

**Voice and Speed of Delivery**

The volume, tone and speed of your speech also communicate various messages. Generally, you want to speak slower and louder than normal. A simple rule is to speak to the person at the back of the room—this way everyone is sure to hear you. You can speak dynamically by varying the pitch and speed of your voice. Vary your pitch from softer to louder tones to emphasise and to gain attention. Similarly, vary the speed of your words—faster to excite and slower to emphasise important points. Ideally your speech should be delivered in a conversational tone, as if you are speaking to a group of trusted colleagues or friends, rather than in a rigid and mechanical fashion.

**Multi-Media Communication**

Your audience will retain more of what you say if you communicate your message in a variety of ways. People learn by listening, seeing, reflecting on experience and doing. This means that you need to present information verbally (appealing to listening), use graphics (appealing to sight) and provide opportunities for your trainees to discuss and apply (reflecting and doing). When trainees are involved in their own learning, they are more likely to remember details of the experience.

**O = Opening successfully**

The first 30-60 seconds of your presentation are key for successfully communicating your message. As you approach the front of the room, all eyes are on you and your audience is determining whether or not you are someone they should listen to. Some participants may still be thinking about the last session, about work at the office, or about a sick child at home. If you fail to get your audience’s attention and respect immediately, you may lose them for the remainder of your presentation. Opening successfully, therefore, becomes critical to the success of your entire presentation.

Opening successfully first requires that you show enthusiasm for your topic. If you are enthusiastic, chances are that your enthusiasm will infect others. The reverse is also true. If you are not enthusiastic about the topic, why then should your audience be?

During your opening, present both your objectives and the benefits your audience will receive from listening. You must let your audience know what it is that you are speaking about and why they should listen. This requires that you learn something about your audience prior to making your presentation. Put yourself in your audience’s place and ask yourself, ‘Why should I listen?’ and ‘What can I get out of this presentation?’ Answers to these questions should be reflected in your introduction and opening statements.
Providing Emergency Support and Advice

From the beginning, you will want to establish trust and build rapport with your audience. One of the most effective ways to open is to make a statement that acknowledges your audience’s situation—pose a rhetorical question to your audience, or ask them for a show of hands in answer to a question. For example, if you are speaking about contingency planning, you might begin like this:

Good afternoon. It’s a pleasure to participate in this emergency management workshop. Thank you for inviting me back to Xenostan, where I was a field officer six years ago. Having gone through this workshop myself, I know how hard you have been working and hope that you are benefiting from it like I know I did. Today, I have been asked to speak to you about the five key steps of the ‘Contingency Planning’ process.

Before I begin, I would like to ask a few questions and have you answer with a quick show of hands. How many of you are involved in any kind of strategic or programme planning activities in your current work? How many of you are familiar with the concept of contingency planning? How many of you have done contingency planning?

In this opening, you have accomplished several important things. First of all, you have established yourself as one of them, as someone they can trust. You did this by letting them know that you have been in their shoes (having attended this workshop yourself) and that you also served in this country (Xenostan). You also let them know that they are important by thanking them and involving them in the presentation via your questions. You have briefly shared the topic (Contingency Planning) and the objectives (‘five steps’), and you have captured their attention by asking them questions.

P = Planning, Preparing and Practising

As you are now aware, making effective presentations takes much more than just delivering content. It requires many other verbal and non-verbal communication strategies as well as planning for an effective opening, delivery of three or four key ideas, and a strong conclusion. In some ways, your presentation is like a short trip. It should have a beginning, an efficient route, and successful arrival at the destination or main point. Be flexible and sightsee at points of interest, but do not take extensive detours from your pre-planned route. This requires that you plan your presentation, prepare your material, and practice your delivery prior to the actual presentation. The main planning stages are:

✔ Outline the main themes or ideas and how to sequence them for maximum impact.
✔ Determine the main points for each idea, the methods for transmitting them (speech, transparencies, handouts, etc.), and the time allocated for each main idea or theme.
✔ Write a draft or outline of your presentation.
✔ Research and prepare your materials (transparencies, flip-charts, handouts).
✔ Practice and rehearse your presentation (e.g. tape record yourself and listen to it, and/or visualise your presentation and your audience).

E = Engaging your Audience

Not only is it important to capture your audience’s attention at the beginning of your presentation, you must also devise strategies for engaging them throughout, lest their attention wander. There are many ways to do this. One of the best ways is to maintain a high level of enthusiasm and passion throughout your presentation. Relevant and interesting stories, anecdotes and examples are also powerful ways to maintain your audience’s attention and to make important points that they can understand intuitively. You can also engage them by asking them to respond to thoughtful or provocative questions, asking one or two of them to share their experience or an anecdote, main-
taining eye contact, using good visual aids, and planning some time for discussion or an interactive exercise (completing a questionnaire for example). Jokes—especially ethnic, racist, sexist, or vulgar ones—should be avoided, as they are inappropriate and sure to offend at least one person in your audience.

S = Sign-Posts and Summary

Throughout your presentation, you have to make it easy for your audience to follow and retain what you are saying. One way to do this is to use a mnemonic, such as the ‘COPES’ acronym that we used to present the material in this chapter. Another way is to sprinkle your presentation with ‘sign-posts.’ In longer presentations, you will want to summarise occasionally during your presentations as well as at the end. This section provides guidelines on using signposts and on summarising.

Sign-Posts

‘Sign-posts’ in oral presentations are words and phrases that explain what you are doing and where you are going. They are transitions, emphases, and reminders that help you structure the pace and direction of your presentation. Especially in situations where your audience has varying degrees of expertise in the language being used, signposts can help them find their way. Commonly used signposts include:

- This presentation is divided into three parts …
- First of all, … Second, …
- To sum up, … or In Conclusion …
- So far I have presented …
- I will next turn to my second point …
- Let me begin by saying …
- This brings me to my third point …
- You will note on the flip chart that …
- Let me spend a moment on that idea …
- Before I go on to the next issue …
- In my opinion, the answer to your question is …
- Your comment brings us to the issue of …

Summary

In longer presentations (over 10 minutes) you will want to summarise occasionally, in addition to providing a wrap-up or conclusion at the end. The best presentations always deliver a forceful summary or conclusion. It is good practice to prepare and rehearse your concluding remarks ahead of time to make sure that you conclude clearly and with confidence.
There are five basic elements for making effective presentations:

- Communicating effectively
- Opening successfully
- Planning, preparing and practising
- Engaging your audience
- Sign-posts and summarising

Presentations should be used to communicate a few simple and big ideas, goals or concepts. Refrain from transmitting detailed or complex information in a presentation.

Communicating effectively requires that you master both verbal and non-verbal communication skills and tactics.

It is important to engage your audience. You can do this by posing questions, asking for a show of hands, asking your audience to imagine a scenario you are about to describe, etc.

Use signposts throughout your presentation to guide your audience. Signposts tell your audience what to expect and help maintain their attention.

In long presentations (more than 10 minutes), you should summarise the main points or recommendations throughout the presentation, not just at the end.

You should prepare your final summary or concluding remarks ahead of time. Always take the time to deliver these remarks clearly and with confidence.
Chapter 6
Self-Assessment Questions

Check T or F to indicate whether a statement is True or False

1. When presenting, it is appropriate to walk towards your participants to emphasise a point or regain their attention.

2. The most important part of your presentation, in terms of grabbing your audience's attention, is the middle part, as this is where most of the content gets presented.

3. Presentations are best used to present and explain the complicated details of an idea, project or proposal.

4. A presenter should avoid building trust and rapport with the audience too early in a presentation, as this may cause the audience to become frustrated.

5. It is usually advisable to tell jokes during your presentation since a little bit of humour will help you keep your audience's attention.

Multiple choice. Mark ALL correct statements—more than one may apply.

6. In presentations, the term 'sign-posts' refers to:
   A. Signs that you post on the walls
   B. Signs that you prepare on overhead transparencies
   C. Words or phrases that structure what you will be speaking about
   D. None of the above

7. The term 'COPES' stands for:
   A. Co-operating, Presenting, Enthusiasm and Summary
   B. Committing, Opening, Presenting, Elevating and Summarising
   C. Coping, Opening successfully, Presenting, Ending successfully, Sign-posts
   D. None of the above

8. Which of the following are ways to communicate non-verbally with your audience:
   A. Maintain eye-contact with your audience
   B. Occasionally turn your back on your audience (this will get their attention)
   C. Walk towards your audience
   D. All of the above
9. Generally, when giving presentations to a large group, you should:

A. Speak faster and louder than normal
B. Speak faster and softer than normal
C. Speak slower and to the person sitting in the front row of seats
D. Speak slower and louder than normal

10. Which of the following strategies are recommended when making presentations:

A. Present only the details of a certain issue or idea, as this is what your audience is most interested in
B. Read from your notes so that you will remember to say everything
C. Speak naturally, and avoid reading or referring to your notes
D. Learn a little bit about your audience ahead of time

Exercise A

Identify a presentation that you may be requested to give in the future. Write down the topic:

______________________________________________________________________
______________________________________________________________________
______________________________________________________________________
______________________________________________________________________

Now draft an outline of major themes or ideas for this presentation.

______________________________________________________________________
______________________________________________________________________
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______________________________________________________________________
______________________________________________________________________
For this same presentation, think of one story or interesting anecdote that you can include in your presentation that will help illuminate a certain point.

List what materials or handouts you will want to leave with your audience.
Chapter 6 Answers

Exercise Answers

The answers will vary depending on your presentation topic.
Organising Workshops

By studying this chapter you will learn about:

- Establishing clear workshop goals and preparing trainees
- Selecting and preparing the workshop venue
- Workshop equipment and material needs
- The advantages and disadvantages of various instructional methods
- The key elements for preparing the learning environment

Workshops and seminars are two options for training large groups. A seminar is a term used to describe a small group brought together for research, discussion and study. Unlike academia, where seminars rely on a ‘guru’ or expert figure to manage, lead and guide the discussion; in training seminars a skilled facilitator manages the discussion and encourages broader leadership and involvement by all participants.

Workshops are usually longer and use many more diverse training methods than seminars. Workshops emphasise learning-by-doing with a strong focus on participation and practical learning exercises or problem solving activities. Workshops provide a flexible way for people undertaking similar tasks to get together in order to learn from one another and share experiences in a meaningful way. Workshop methods include presentations by workshop trainers, experts and resource persons, as well as many interactive opportunities and activities for participant involvement.

As someone responsible for providing emergency support and advice, you may find yourself in charge of planning and organising workshops as well as seminars. This chapter deals with what you will need to know to plan and organise workshops and seminars for UNHCR.

Requirements for Successful Workshops

Set Clear Goals and Objectives

Workshop goals should be broken down into training or learning objectives which specify what specific knowledge will be transferred and/or which skills will be developed, who the training audience is, and what general training methodology will be used.

Setting clear goals and objectives is not only dependent on the topic, but also on the needs and interests of the training audience. Before any workshop, it is important to ask who needs to be trained or advised, what do they need to know, how many people will be involved, what is their current level of
Providing Emergency Support and Advice

experience, and have they already had training in this area? The questions are obvious, but they are often not asked. There are a variety of ways to assess learning needs. At a minimum, it is a good idea to contact 1-3 of the trainees before the session (either in person, by phone or email) to find out their expectations and objectives for the workshop.

**Plan and Prepare for the Workshop**

The most effective workshops depend on thorough preparation. Workshop organisers must prepare the agenda, the trainees, the venue, and the equipment and materials. While essential, few will notice when these details are properly attended to. When they are neglected, however, they can produce a setting in which learning cannot effectively take place. In this chapter, some of the basic workshop preparations are discussed. More detailed coverage of workshop and training organisation is provided in UNHCR’s Training-of-Trainer’s module, available from the Staff Development Section. For specific UNHCR training administrative issues and concerns, such as issuance of PT8s, travel and DSA rates, contact your department’s training co-ordinator or UNHCR’s Staff Development Section.

**Preparing the agenda**  An agenda or schedule must result from goal setting and assessment of need and should flow logically from one topic to the next. The agenda timing should also recognise high and low energy times of the day. Usually, trainees are more energetic during the pre-lunch sessions than in the afternoon. Therefore, it is generally good advice to schedule the sessions that are the most demanding or difficult in the morning.

*Most workshop sessions should be limited to 90 minutes.* Participants become tired, thirsty, need a cigarette, have to use the toilet, or become otherwise distracted during longer sessions. Try to cut topic blocks into units or pieces that adequately address issues in 90 minutes or less. The greatest and most common failure of workshops/training sessions is that they try to force too much information into too little time while simultaneously asking participants to stay too long past their comfort limit in any one session.

If there has been little pre-workshop assessment of trainee interests and needs, it is important to spend time during the first session comparing your agenda with the expectations, goals and needs of your participants. If the exercise reveals a deep division between the participants’ desired goals and the pre-planned goals, the agenda must be modified to suit the actual situation, while not losing sight of the emphasis behind the original programme. This balancing act can be difficult at times, but must be done if participants are to be included in the training as colleagues.

**Preparing the trainees**  While you generally will not have complete control over who attends the workshop, you should at least develop a desired trainee profile to share with institutions and agencies that are invited to send participants. This will help you obtain a good mix of participants.

Once the list of trainees is determined, establish contact with them prior to the workshop. This can generally done by letter, email or telephone. A simple communication explaining the terms, scope and expected outcome of the workshop is sufficient (include dates, time, venue, travel directions, administrative arrangements, telephone and contact person, course agenda, etc.) Many administrative details must be attended to in the design and implementation of even a small workshop, particularly if the attendees are expected to travel or shift work assignments to other staff members.

**Preparing the workshop environment**  Selecting the workshop venue or facility is an important consideration. Does the group need to get away from the office in order to focus more intently on the topic? Or, do they need to be close to the office in order to respond to urgent work requests? Generally, it is advisable to hold the training workshop off-site and far enough away so that the
trainees’ attention is not divided between the workshop and the demands of their office. If the workshop is held on-site or near trainees’ offices, you are almost guaranteed to lose participants for small or major parts of the workshop. You will find yourself repeating information for those who missed parts of the training, and needing to reduce the amount that you can cover in the allotted time.

The training environment refers to all the things external to the trainer and the workshop thematic content which can affect the success of the workshop and the transfer of learning, including: workshop duration, location, room temperature, number and mix of participants, room layout and seating. Each one of these variables has a real effect on the quality of the training. For example, if participants are seated in rows arranged in a traditional classroom setting, a ‘school mentality’ may prevail where the trainer is considered to be the only expert and, therefore, the only one to speak while the participants sit passively taking notes, like students in grade school. On the other hand, if participants are seated in small groups of four to six, a team building and collegial atmosphere is promoted. The successful trainer is able to manage the training environment to the fullest extent and minimise any negative effects.

If the event is to run smoothly, the facility must offer a basic level of service. If administrators, facilitators and trainers, for example, are constantly fighting bad lighting, space that is too small, and participants complaining about bad food and the distance to banks and shopping; the time and energy left for discussion and learning is greatly reduced. The cheapest venue is not necessarily the best venue. Some constraints are so difficult to overcome that even the best trainers and facilitators cannot succeed. When selecting a training venue, consider the space requirements, seating arrangements, equipment and refreshment/dining facilities that the location provides.

Preparing the training equipment and materials
Since workshops rely on a variety of training methods, it is essential that the workshop co-ordinator ensure that all of the necessary equipment and materials are present. The workshop organiser must consider the need for overhead projectors, VCRs and television screens, flip-chart paper and markers, masking tape, scissors, notebooks, writing pads, and many other equipment and material needs. Since workshops or training sessions often involve experts from different organisations or offices, make sure you communicate with them before the workshop to verify exactly what they will need. It is best to determine the minimum needs before hand and ensure that the facility has them.

Use Skilled Workshop Trainers and Facilitators
A content expert who does not understand adult learning, who cannot design or facilitate interactive teaching activities, or who is a bad communicator will fail as a workshop trainer. A workshop that relies solely on this person to facilitate the event will also fail. Likewise, if the mix of participants does not include resource or content experts, or individuals with considerable experience in the topic area, a trainer with excellent facilitation skills, but little or no knowledge of the content, can also fail.

It is often difficult to find individuals who possess both content expertise and professional training and facilitation skills. Therefore, most workshop trainings should make use of both content experts as resource people and professional trainers who can help design, structure and facilitate interactive workshop activities.

You can locate good speakers and trainers in a number of ways. First, rely on your own or your colleagues’ previous experience. Who did you work with? How did they work out? Were they effective? What are their strengths and weaknesses? Review the previous course evaluations and talk to past participants. Contact other training managers and co-ordinators within the UN system or in other international disaster/emergency management organisations and ask their advice on good speakers, trainers or facilitators. It will be up to you as the workshop manager to determine the exact
mix you require and which criteria are the most important. For example, if you have a dynamic speaker with a lot of field experience who lacks workshop training and facilitation skills, you may want to employ another trainer with these skills who can fill the gap.

Use a Variety of Instructional Methods

Variety is the spice of life. The same can be said of workshops. By employing a variety of methods, you are more certain to sustain your trainees’ attention and appeal to the activist, reflective, theoretical and pragmatic learning styles described in Chapter 3. The following matrix compares the applications, advantages and disadvantages of some of the major instructional methods.

### Comparison of Instructional Methods

<table>
<thead>
<tr>
<th>Method and best application</th>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
</table>
| **Lecture/formal presentations** | • Download a lot of information quickly  
• Useful for large groups | • Easily forgotten  
• Passive learning  
• No feedback from trainees  
• Tiring after 15 minutes  
• Short attention spans |
| **Case Studies** | • Build problem solving skills  
• Generate multiple and creative solutions  
• High participant involvement  
• Participants’ experience valued  
• Move out of abstract principles into realistic situations | • Require time to write  
• Need time to read, problem solve and discuss  
• Require participants with appropriate level of experience to analyse and provide useful and concrete ideas |
| **Role-plays, simulations, games** | • Practice skills and receive feedback in non-threatening environment  
• Create ‘life-like’ feeling to the issue or topic  
• High participant involvement  
• Involve the trainees’ emotions and intuition  
• Build interpersonal skills and awareness  
• Can be video-taped for later viewing by trainer and trainees | • Some trainees may be uncomfortable or hostile to playing a role  
• Require time to plan, write roles and scenarios (especially simulations)  
• Require time to explain, conduct and debrief for maximum impact  
• Without a serious debriefing or discussion of lessons learned and applications to real life, the learning opportunity can be lost |
### Group discussions
- When you want trainees to share their opinions and experience
- Allow conflicting viewpoints to emerge and be debated
- Allow examples and anecdotes from trainees’ experience
- Raise issues that you will address in a case study or presentation

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show respect for trainees’ opinions and experience</td>
<td>With a bad facilitator, the discussion may stall completely or get so heated that emotions flare and insults are hurled</td>
</tr>
<tr>
<td>Involve trainees in the teaching and learning process</td>
<td>Good discussions require trust</td>
</tr>
<tr>
<td>Rely on the real opinions and experience of trainees</td>
<td>Take time to create momentum and engage trainees</td>
</tr>
<tr>
<td>Can help highlight many important, complex and interrelated issues</td>
<td>Some trainees may want trainer to provide the final or ‘correct’ viewpoint</td>
</tr>
<tr>
<td></td>
<td>New, tangential issues may be raised and may require additional time to discuss</td>
</tr>
</tbody>
</table>

### Brainstorming
- To generate many ideas
- To generate novel and wild solutions
- To identify opportunities

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generates many good ideas</td>
<td>Becomes tiring if overused</td>
</tr>
<tr>
<td>Involves trainees</td>
<td>Requires an adept facilitator who understands the ‘rules’ of brainstorming</td>
</tr>
<tr>
<td>Can be done quickly and painlessly</td>
<td>Good ideas require the right participants with the appropriate knowledge or experience</td>
</tr>
</tbody>
</table>

### Projects and practice
- For experienced trainees
- To practice professional skills (e.g. contingency planning exercise, presentation skills)
- Workshop objectives related to project design and implementation

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>High trainee involvement</td>
<td>Require time and thinking to plan appropriate project tasks</td>
</tr>
<tr>
<td>Trainees apply their knowledge and experience</td>
<td>Projects not relevant to trainees’ needs or interests will fail to engage them</td>
</tr>
<tr>
<td>Stimulate initiative and creativity</td>
<td>Require time to develop, plan, present and discuss</td>
</tr>
<tr>
<td>Design a project in a safe, non-threatening environment</td>
<td></td>
</tr>
<tr>
<td>Can be used to begin planning or implementing real-life projects</td>
<td></td>
</tr>
</tbody>
</table>

### Use of Simulation Exercises
Emergency management is unique in that management is conducted under extreme crisis and duress and situations are often unfamiliar and unexpected. Emergency management workshops should therefore help prepare participants for the complexities and stress of an actual emergency. One of the best ways to do this is to conduct emergency role-plays and simulations. Participants playing roles are presented with a problem to be dramatically played out. They are practising what they would do if the portrayed situation were real. The purpose is accurate modelling of an emergency situation and provision of practice opportunities as a preparation for active service.
Some preparedness aspects might be improved through simulation drills of various sorts. Emergency evacuation and security drills of various types that involve only the immediate office staff, for example, can be staged relatively easily. It is important to remember though, that especially in these cases, it is just as important to analyse what went well and what areas still need improvement after the drill has been completed. The simple playing out of the exercise, without a grading or analysis of the actions taken, is relatively meaningless. In fact, without expert analysis of the participants' actions, they may in fact 'learn' or reinforce activities or ideas about preparedness which are not recommended.

**Modeling or Illustration Simulations**

Some simulation exercises are conducted for the purpose of making a model or illustration of an emergency situation or response for the sole purpose of raising awareness of issues and for setting a productive basis on which to hold discussions or further analysis. One example of this is the ‘Suremia Simulation’ which has long been a part of the UNHCR Emergency Management Training Programme (EMTP). This is a one-day exercise that models an emergency refugee influx situation in a fictional country called Suremia.

The purpose of this type of simulation is to illustrate the interconnected responsibilities of the multiple responders to refugee/IDP situations. It also serves as a model for the complex dynamics that occur between various emergency response actors and the constraints and pressures that different organisations/factors face. These types of simulations can also highlight additional areas for co-ordination and training, but are less effective in teaching sectoral skills in emergency management.

Designing and developing this type of multi-part complex simulation takes considerable time, and running it is quite difficult. The EMTP simulation works quite well since it has been run many times in many different contexts (and languages) and has been constantly revised and kept up-to-date with changing field realities. Contact EPRS for more information on this training tool.

**Table Top Simulations**

These simulations re-create meetings or other multi-participant processes that occur in meeting situations. For example, contingency planning workshops could make much use of the dramatisation of meetings that could be foreseen if an emergency involving refugees or IDPs were to occur. Players representing government ministries along with UNHCR protection and programme officers as well as local and international NGO representatives could be given a fictitious scenario (which may be completely fictitious or based on current events).
Workshops emphasise learning-by-doing with a strong focus on participation and practical learning exercises or problem solving activities.

Workshop goals should reflect both the content which must be taught and the particular needs and interests of the workshop audience.

Successful workshops require proper planning and preparation of the agenda, trainees, workshop environment, equipment and materials.

Workshop trainers and facilitators should include individuals or training teams that possess both content expertise and excellent facilitation and training skills.

There are many training methods that can be and are used in workshops. These include presentations, case studies, simulations, role-plays, group discussions, brainstorming, and projects or practice sessions. Uses, advantages and disadvantages of each are considered in this chapter.
Chapter 7
Self-Assessment Questions

Check T or F to indicate whether a statement is True or False

1. The quality of the training environment can have a significant impact on the quality of the training workshop. T F

2. Workshop trainers are not responsible for setting up the training room and seating, since this is the job of the facility or venue managers. T F

3. One of the advantages of using simulations as a training method is that they are easy to design and are simple to conduct. T F

4. Traditional style classroom seating does not promote an interactive and collegial training environment. T F

5. The primary method used in workshops is expert presentation, since this encourages interaction. T F

Multiple choice. Mark ALL correct statements—more than one may apply.

6. Advantages of case studies as an instructional method include:
   A They build problem solving skills
   B They take little time to prepare and develop
   C They encourage participant interaction and involvement
   D None of the above

7. The length of most workshop sessions should be limited to:
   A 20 minutes
   B 40 minutes
   C 90 minutes
   D 200 minutes
   E None of the above

8. Which of the following activities do you need to consider prior to the workshop:
   A The mix and desired profile of participants
   B The specific requirements for a workshop venue
   C The primary goals and topics to be discussed at the workshop
   D Identifying, contacting and scheduling trainers and speakers
9. Emergency simulations are good tools for all of the following except:
   A Modelling the complex dynamics that occur between actors in emergency response
   B Modelling the constraints on various emergency response actors
   C Learning sectoral skills
   D Illustrating the need for further training and development in co-ordination and other policy areas

10. Which of the following statements are true of workshops:
   A They are relatively inexpensive to organise and conduct
   B They use instructional methods which emphasise passive learning
   C They require significant preparation and organisation prior to the workshop event
   D None of the above

Exercise A

Using the design matrix below, design a workshop programme agenda for a two-day workshop on emergency preparedness for 20 participants. Some of your goals for this workshop include:

- Build problem solving skills
- Involve participants in ‘life-like’ scenarios
- Encourage participants to share their expertise and opinion
- Share the general framework and concepts associated with emergency preparedness
- Generate creative ideas and solutions to some common problems

List the names of your session and the method(s) you would use to deliver them. Also, in the space provided, list any and all assumptions you make in order to arrive at your agenda (include assumptions about skill level and language abilities of participants, trainer(s) competencies, the training room, and any other assumptions that must be true in order for your workshop to be conducted successfully).

Assumptions made:
Programme Agenda for 2-day Emergency Preparedness Workshop

<table>
<thead>
<tr>
<th>Day 1</th>
<th>Topic</th>
<th>Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-10:00</td>
<td>SESSION</td>
<td></td>
</tr>
<tr>
<td>10:00-10:30</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>10:30-12:00</td>
<td>SESSION</td>
<td></td>
</tr>
<tr>
<td>12:00-1:30</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>1:30-3:00</td>
<td>SESSION</td>
<td></td>
</tr>
<tr>
<td>3:00-3:30</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>3:30-5:00</td>
<td>SESSION</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 2</th>
<th>Topic</th>
<th>Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-10:00</td>
<td>SESSION</td>
<td></td>
</tr>
<tr>
<td>10:00-10:30</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>10:30-12:00</td>
<td>SESSION</td>
<td></td>
</tr>
<tr>
<td>12:00-1:30</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>1:30-3:00</td>
<td>SESSION</td>
<td></td>
</tr>
<tr>
<td>3:00-3:30</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>3:30-4:30</td>
<td>SESSION</td>
<td></td>
</tr>
<tr>
<td>4:30-5:00</td>
<td>SESSION</td>
<td></td>
</tr>
</tbody>
</table>

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### Chapter 7 Answers

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. T</td>
<td>6. A, C</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. F</td>
<td>7. C</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. F</td>
<td>8. A, B, C, D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. T</td>
<td>9. C</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. F</td>
<td>10. C</td>
<td></td>
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</tbody>
</table>

**Exercise Answer**

Although individual answers may vary widely, the example on the next page satisfies the stated goals of the activity.
Exercise Answer

Although individual answers may vary widely, the following example is a good one and satisfies the stated goals of the activity.

Assumptions: Among the 20 participants there are many who have some field experience dealing with refugee emergencies. All participants speak English. The participants include a mix of sectoral specialists as well as emergency management generalists.

<table>
<thead>
<tr>
<th>Day 1</th>
<th>Topic</th>
<th>Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-10:00</td>
<td>Introduction, overview and objectives</td>
<td>Presentation, participant introductions, card and chart technique</td>
</tr>
<tr>
<td>10:00-10:30</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>10:30-12:00</td>
<td>Table top simulation involving a case study of a refugee emergency</td>
<td>Written case study with questions discussed in small groups</td>
</tr>
<tr>
<td>12:00-1:30</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>1:30-3:00</td>
<td>Debriefing and lessons learned from the case study</td>
<td>Plenary discussion.</td>
</tr>
<tr>
<td>3:00-3:30</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>3:30-5:00</td>
<td>Framework and key elements of Emergency Preparedness</td>
<td>Trainer presentation followed by questions and answers from the audience</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 2</th>
<th>Topic</th>
<th>Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-10:00</td>
<td>Early Warning and Contingency Planning</td>
<td>Presentation and small group exercise</td>
</tr>
<tr>
<td>10:00-10:30</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>10:30-12:00</td>
<td>Technical sectoral issues and indicators (Water/Sanitation, Emergency Health, Food)</td>
<td>Short quiz, followed by presentation and questions and answers</td>
</tr>
<tr>
<td>12:00-1:30</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>1:30-3:00</td>
<td>Case study exercise on co-ordination</td>
<td>Small work groups (according to agencies or sectors)</td>
</tr>
<tr>
<td>3:00-3:30</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>3:30-4:30</td>
<td>Small Groups report back</td>
<td>Reports and plenary discussion</td>
</tr>
<tr>
<td>4:30-5:00</td>
<td>Evaluation and Wrap-up</td>
<td></td>
</tr>
</tbody>
</table>
Training Evaluation

By studying this chapter you will learn about:

- The purpose of training evaluation
- The types of baseline data needed for proper evaluations
- Kirkpatrick’s four levels of evaluation
- Methods for evaluating your own performance as a coach/training facilitator

Evaluations are used to verify that current plans or strategies are producing desired results. In the case of providing emergency support and advice, the desired result is likely to be improvement in protection and relief to refugees and other displaced populations. During the training design process, training facilitators need to determine what results are desired, and what data can be collected to show that a change has occurred. In other words, they must plan for the evaluation from the outset. Successful evaluation involves three key components:

- Understanding what impact is desired, in quantifiable terms
- Understanding the pre-coaching/training status (baseline) of the trainee(s)
- Ability to collect and analyse post-coaching/training data for comparison against the baseline

Evaluations can vary in scope and complexity. For example, immediately after a training, you might want to know which of the training sessions participants liked best and which they liked least. A much more complex level of evaluation involves evaluating whether a given training option had a positive impact on the organisation’s performance and the ‘size’ of its impact. Each level of evaluation depends on gathering data. This chapter provides guidelines for collecting data and describes the various levels of evaluation that can be conducted.

Establishing Baseline Data for Evaluation

Baseline data describe the situation existing prior to the start of a training programme. Data should describe the current level of experience, skills and knowledge and should help answer specific questions about performance or impact. These data provide a starting point against which to measure progress. Baseline data include any information that helps to illustrate the situation which needs improving. If baseline data have not been established in the training needs assessment phase, the coach or advisor will need to establish this information at the beginning of the coaching/training sessions or programme.
For inexperienced trainees and participants, baseline data will consist of current knowledge about the topic areas, organisational policies, and best practices. For those staff who have emergency experience or who are working in areas of protracted emergencies, baseline data will also consist of an analysis of their past responses/actions in emergencies. In this case, however, one must be careful to differentiate the reasons or motivations for certain behaviours and actions. For example, failure to provide a large refugee population a safe and appropriate site for an emergency refugee camp may result from many factors—the government may not allow selection of a better site; refugees may not be easily moved from unsuitable border areas because of their extremely critical situation; planners may be ignorant of site problems; or refugees may refuse to move—only some of which may be affected by training or advising. In this example, only the lack of information and experience about site problems can be affected by training. Future repetition of the same problem may indicate that outside constraints do not currently allow a better response not that individuals have not learned.

Levels of Training Evaluation

There are many reasons for conducting evaluations, including:

- To improve the quality of your own coaching, advising, or training.
- To make choices between training options (for example between coaching and a workshop, or distance education).
- To learn lessons that are applicable to future coaching and training programmes or assignments.
- To ensure accountability of both training facilitators and trainees.

Kirkpatrick’s evaluation typology is widely used to distinguish between four broad levels of evaluation. These four levels describe the scope of the evaluation in increasing complexity:

I. Evaluation of participant reactions and efficiency of training delivery method
II. Evaluation of changes in learning (knowledge and acquired skills)
III. Evaluation of changes in job performance and behaviour
IV. Evaluation of impact on the organisation

These levels are discussed below in terms of what each attempts to measure, and the ease and/or difficulty of evaluating training at each level. The vertical axis represents complexity (and therefore cost) of the evaluation and the horizontal axis represents the time span required for conducting each level of evaluation.
Level I: Evaluation of Participant Reactions and Efficiency of Training Delivery Method

This first level of evaluation is often referred to as the ‘smile index.’ It is the most widely used and institutionalised type of evaluation for in-house, informal, and workshop-based trainings. It seeks to measure how participants feel about the training or session they have just completed. It relies on the belief that each participant processes the effect of the training on him or her, evaluates this impact and expresses the result as their general satisfaction or ‘happiness’ with the event. It includes such questions as:

Did the workshop or session go as planned?  
Were your expectations met?  
How did you feel about the pace, focus, and topics included in the workshop?  
What were the main lessons learned? How will you apply them in your job?

This is a common method as it is easily done via a questionnaire handed out at the end of a training/coaching session. It provides administrators and others with a written record of the evaluation in the participants’ own words. This type of evaluation may also be carried out very effectively in a small group discussion or a frank meeting between the coach and coachee at the end of the coaching session or mission.

This type of evaluation is useful for identifying which topics participants think they learned and for obtaining participants’ suggestions for improving the training in the future. As such, they also help improve the coach’s/facilitator’s future performance.

Level II: Evaluation of Changes in Learning (Knowledge and Acquired Skills)

Evaluation of what the participants actually learn as a result of a training/coaching session requires effort both before and after the event. Some type of measurement must be made before the training starts as well as after it is complete, and these results compared. The improvement, for example, on a prepared exam or written test about the topic taken before and after the coaching or training event shows what participants have learned. If the training is skill based, then the exam or measurement must be done through actual demonstration of the skills rather than based on what one knows about the skills or the theories used to describe them.

Methods used for this type of evaluation include questionnaires and evaluation forms as well as other specific tools. Some of these tools are course exams or tests, instructor or institution grades and transcripts, and self-reporting. Group discussion and peer review are also possible means for evaluation at this level.

Level III: Evaluation of Changes in Job Performance and Behaviour

This level of evaluation is more difficult than the previous two levels, but is more important because it measures real change in behaviour or job performance—the goal of all training and/or coaching and advising. This is what evaluators really want to know, but it often goes undone. The reasons for this are many, but they generally relate to the cost and uncertainty of the results of such an evaluation. It may be as expensive to evaluate a short training event in this way as it is to conduct the training itself.

The reliability of the evaluation may also be questioned. For example, if 30 people in an organisation have been trained in emergency management, it would be appropriate to revisit these same people after one year to evaluate if they translated lessons from the training into behavioural actions in their positions over the one year period. The problem will be that some of the people will
have left the organisation, some will have shifted to positions where they are not required to act in relation to emergencies, still others may also have had other trainings in the interim which may be affecting their actions more than the training you are interested in evaluating. There are too many variables that may arise to interfere with the evaluator’s ability to arrive at a sound conclusion.

This level of evaluation is appropriate where the cost of the training or coaching is high, where groundwork has been done to establish skill or knowledge level beforehand, and where the organisation supporting the initiative has adequate funding and long-term interest in running and perfecting such training programmes.

Methods for this type of evaluation include pre- and post training testing measures in the form of written exams and tests or verbal interviews. Formal self-reporting over time intervals can also be effective since the trainees may be able to shed light on other factors influencing their skill and knowledge levels over time. Evaluators should be prepared to follow up over time via distance communications as well as on site follow-up visits and interviews with staff and their supervisors.

**Level IV: Evaluation of Impact on the Organisation**

This level of evaluation is considered the most interesting in organisational development terms, the most time consuming and, ultimately, the most costly. It seeks to measure organisational impact in areas of programme design and implementation, real benefits to programme beneficiaries and greater overall organisational efficiency. Typical questions of these types of evaluations are:

*Has the training led to better programmes or services to beneficiaries?*
*Is the organisation more effective?*
*Has the training had any positive effect on the organisation?*

Methods employed for this type of evaluation include careful collection and measurement of baseline indicators at an organisation-wide scale or scope, analysis of trends and changes in the organisation as a whole over time, ‘benchmarking’ performance of the organisation against other organisations with similar mandates or charters, monitoring of control groups within the organisation, monitoring of career development choices and trends within the organisation including staff turnover rates, and promotion/retention patterns within the organisation as related to the training area or focus.

**Evaluation Over Time**

More complex impact assessments (Levels III and IV) rely on evaluations over time, particularly after periods of activity which call upon the use of the skills or knowledge, for example after an emergency contingency planning exercise or response operation. This type of evaluation, while important, is often not planned for, budgeted, or in some cases wanted. When an organisation is undergoing major changes from a variety of different pressures, it may seem inappropriate to evaluate programs which themselves are under change or which have been discontinued.

This level of evaluation is rarely done because accurate measurement of training impact is often seen as a daunting, if not insurmountable task. For an impact assessment to reveal accurately the change or impact that training has over time, it is necessary to account for and neutralise all external factors that may have influenced the outcome or performance. This includes previous level of skills and knowledge; political factors and influences; other training that participants may have received; influence and performance of colleagues, superiors and subordinates; additional funding; changes in policies; organisational restructuring; changes in technical and material equipment used; and many
others. To do this effectively, the manager, administrator, or evaluator will need to carry out the following activities:

- Set systems in place for tracking the movement or rotation of staff who are to be trained, even though they may rotate out of your desk, bureau, section or unit.
- Require all participants to test, interview, or take an exam in the topic area of concern. Set in place a system for archiving and monitoring this record over time for comparison against future testing or interviews.
- Conduct training, advising and coaching sessions with clear standards or levels of skill to be attained. Set in place a system for delivering this support to those who need it.
- Keep in contact with those who have been trained over several months. Follow up with short surveys or interviews as appropriate. For coaches, keep your colleagues email and phone contact information as an entry in your address book. Remember to follow up regarding the topic area in the future.
- Set a timeline for completion of these stages. After a set period (say one year) issue surveys or tests, or conduct interviews with either the entire group of those trained or a representative sample. As part of the process, use the identical questionnaire or exam that you used to establish their baseline status.
- After analysis of a significant data set, record findings and prepare reports for decision-makers who decide on continuation, termination, or alteration of the programme.

**Evaluating Your Performance as a Training Facilitator**

In addition to evaluating the effect of training/coaching on the trainees’ performance, it is also necessary to evaluate the training facilitator’s/coach’s performance. A session or event evaluation form is the standard method for conducting evaluations for short training events and is adequate for evaluating at Kirkpatrick’s Level I — reaction to the event. This will be helpful since you will receive immediate feedback on how well participants received your presentation or event. Carefully worded questions will help you obtain information on how you can improve your future performance as a coach, facilitator, or trainer.

Another method for getting feedback on your performance is to conduct an interview or discussion with former trainees. These interviews should be conducted shortly after a session in order to capture what points have made the most impact on your colleague(s). After some time has passed, similar interviews will help you learn what parts of your coaching were found to be valuable in the longer term as well.
There are at least four reasons for conducting evaluations of emergency training, support and advice options. These reasons are:

- To improve the quality of your own coaching, advising, or training
- To make choices between training options (for example between coaching and a workshop, or distance education)
- To learn lessons that are applicable to future coaching and training programmes or assignments.
- To ensure accountability of both training facilitators and trainees.

To carry out an impact assessment, or evaluation of training impact, it is necessary to collect and compare baseline data and result data relating to the pre-training situation and the post-training situation, respectively.

For an impact assessment to reveal accurately the change or impact that training has had over a long period of time (say after 3-6 months), it is necessary to account for and neutralise all external factors that may have influenced the outcome. This includes political factors, other training that participants may have received, influence and performance of colleagues, superiors and subordinates, additional funding, changes in policies, changes in technical and material equipment used, and many others.

Baseline data describe the situation existing prior to the start of a training programme. Data should describe current level of experience, skills and knowledge. These data provide a starting point against which to measure progress.

Kirkpatrick’s four levels of evaluation are:

- Level I: Reaction, lessons learned and efficiency
- Level II: Learning of skill or knowledge
- Level III: Participant, on the job behaviour changes
- Level IV: Organisational results and impact

As you progress from Level I to Level IV, the time span increases for when the evaluation is conducted, and the more complex (and therefore more difficult, expensive and time consuming) the evaluation becomes.

It is important to receive feedback and evaluation of your own performance as a coach or training facilitator.
Chapter 8
Self-Assessment Questions

Check T or F to indicate whether a statement is True or False

1. Evaluations can be used to determine if the desired results have been achieved and to document lessons learned along the way. **T**

2. Baseline data should be identified mid-way through the training programme, once the training facilitator is familiar with the specific trainees. **T**

3. Evaluating the impact of training on the organisation is usually a straightforward and simple exercise that should happen immediately following the conclusion of a training programme. **F**

4. Evaluation forms that participants complete at the end of a workshop serve no real purpose. **F**

5. As you move from the first to the last level of evaluation in Kirkpatrick’s model, evaluation becomes much more difficult and complex. **T**

Multiple choice. Mark ALL correct statements—more than one may apply.

6. Which of the following statements are true about evaluation of training and staff development activities:
   - A Training cannot be evaluated
   - B Training can be evaluated, but it is often difficult to neutralise other influencing factors
   - C Training facilitators need to be thinking about evaluation from the beginning of the training design process
   - D None of the above

7. To successfully carry out an evaluation over time requires that:
   - A Systems for tracking data and trainee progress are in place
   - B Evaluation activities are planned and budgeted from the outset of the training programme
   - C Baseline data be established and collected at the outset of the training programme
   - D All of the above
8. Kirkpatrick’s four levels of evaluation include all of the following except:
   A. Participant preconceived notions about the training programme
   B. Participant reaction to the event
   C. Participant learning and performance improvement
   D. Impact of training programme on the organisation’s performance

9. Which of the following four Kirkpatrick evaluation levels is commonly referred to as the ‘smile index’:
   A. Level I
   B. Level II
   C. Level III
   D. Level IV

10. As you move from Level I to Level IV in Kirkpatrick’s evaluation model:
    A. Evaluation becomes more complex
    B. Evaluations measure different things
    C. Evaluations generally will cost less
    D. Evaluations will become simpler

Exercise

Imagine that you have been asked to coach and train several colleagues on

(Choose the topic to enter in this blank space)

Briefly list here what essential information, skills and abilities a trainee should have at the conclusion of your coaching or training programme.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
What baseline data will you collect prior to the beginning of your training programme? How will you collect it?

Describe what evaluation method or approach you will use to gather data for each of Kirkpatrick’s four levels of evaluation:

Level I

Level II

Level III

Level IV
Exercise Answers

Answers will depend on what topic is chosen.

Evaluation methods for each level:

Level I: Questionnaire provided at the conclusion of the workshop session.

Level II: Questionnaires and evaluation forms. Course exams and self-reporting may also be used. Peer review is another evaluation option.

Level III: Pre- and post-training methods including written exams or verbal interviews. Formal self-reporting can also be used. There may also be a ‘control group’ compared to a non-control group.

Level IV: Collection and measurement of baseline indicators through surveys, interviews and observation. Benchmarking. Monitoring career development choices within an organisation.
Formal Institutional Courses

Some sources/institutions for formalised academic training are:

**Asian Disaster Preparedness Center (ADPC)** Bangkok, Thailand
Offers a wide variety of disaster and emergency related courses.
*Email: icmadpc@ait.ac.th*

**Columbia University**, New York, USA
Public Health in Complex Emergencies, Etc. This is a new programme. Currently only offered at the New York Campus, but will be offered in Africa, Europe and Asia in the near future.
*Email: ssk19@columbia.edu*

**Coventry University**, United Kingdom
Offers two undergraduate programs and one graduate degree programme in disaster management.
*www.coventry.ac.uk/acad/sbe/disaster*

**Cranfield University**, Shrivenham, United Kingdom
Disaster management courses held residentially at the Cranfield Disaster Management Centre.
*Email: disp@rmcs.cranfield.ac.uk*

**Tufts University**, USA
Offers a new Masters programme in Humanitarian Assistance, a one-year degree for professionals with field experience in the areas of famine, conflicts and complex emergencies.
*Email: jhammock@infonet.tufts.edu*

**University of Wisconsin Disaster Management Center**, USA
In 1994, as part of its ongoing commitment to professional development in disaster/emergency management, the UW–DMC established the Disaster Management (DM) Diploma. This is a personal study program which can combine UW–DMC self-study courses with courses from other organisations anywhere in the world. The Disaster Management Diploma Program also qualifies as one program option available to candidates for the Professional Development Degree Program sponsored by the Department of Engineering Professional Development, University of Wisconsin–Madison.
*Email: dmc@epd.wisc.edu*
Providing Emergency Support and Advice
Learning Styles Questionnaire

This questionnaire, developed by Honey and Mumford, was designed to find out your preferred learning style(s). Over the years you have probably developed learning habits that help you benefit more from some experiences than others. If you have not considered your own learning habits carefully, this questionnaire will help you to identify them. Understanding your own learning style will help you to see more clearly your own biases as a trainer.

While there is no set time for filling out this questionnaire, you should attempt to answer questions quickly, based on your immediate sense about the answer, without lengthy consideration. It should take between 15 and 20 minutes to complete. The accuracy of the results will depend on how honestly you answer the questions. Try to think about how you actually learn, not how you think you should learn, or would like to learn. There are no right or wrong answers to this questionnaire. If you agree with a statement more than you disagree with it, place a ‘Y’ (YES) in the box next to it. If you disagree more than agree, place an ‘N’ (NO) in the box.

In the left column, if you agree with a statement more than you disagree with it, place a ‘Y’ (YES) in the box next to it. If you disagree more than agree, place an ‘N’ (NO) in the box.

1. I have strong beliefs about what is right and wrong, good and bad.

2. I often take risks.

3. I tend to solve problems using a step-by-step approach, avoiding any intuitive jumps.

4. I believe that formal procedures and policies inhibit people’s lifestyles.

5. I have a reputation for having a no-nonsense, straightforward style.

6. I often find that actions based on intuition are as sound as those based on careful thought and analysis.

7. I like to do the sort of work where I have time to look at every detail.

8. I regularly question people about their basic assumptions.

9. What matters most is whether something works in practice.

10. I actively seek out new experiences.

11. When I hear about a new idea or approach, I immediately start working on how to apply it in practice.

12. I am keen on self-discipline such as watching my diet, taking regular exercise, sticking to a fixed routine, etc.
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<tbody>
<tr>
<td>13.</td>
<td>I take pride in doing a thorough job.</td>
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<tr>
<td>15.</td>
<td>I take care over the interpretation of data available to me and avoid jumping to conclusions.</td>
</tr>
<tr>
<td>16.</td>
<td>I like to reach a decision carefully after weighing many alternatives.</td>
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<td>17.</td>
<td>I am attracted more to novel, unusual ideas than to practical ones.</td>
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<td>18.</td>
<td>I don’t like ‘loose ends’ and prefer to fit things into a coherent pattern.</td>
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<td>19.</td>
<td>I accept and stick to laid-down procedures and policies so long as I regard them as an efficient way of getting the job done.</td>
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<tr>
<td>20.</td>
<td>I like to relate my actions to a general principle.</td>
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<tr>
<td>21.</td>
<td>In discussions I like to get straight to the point.</td>
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<tr>
<td>22.</td>
<td>I tend to have distant, rather formal relationships with people at work.</td>
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<tr>
<td>23.</td>
<td>I thrive on the challenge of tackling something new and different.</td>
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<tr>
<td>25.</td>
<td>I pay meticulous attention to detail before coming to a conclusion.</td>
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<tr>
<td>26.</td>
<td>I find it difficult to come up with wild, creative ideas.</td>
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<tr>
<td>27.</td>
<td>I don’t believe in wasting time and want to get straight to the point.</td>
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<tr>
<td>28.</td>
<td>I am careful not to jump to conclusions too quickly.</td>
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<tr>
<td>29.</td>
<td>I prefer to have as many sources of information as possible – the more data to consider, the better.</td>
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<tr>
<td>30.</td>
<td>Flippant people who don’t take things seriously enough usually irritate me.</td>
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<tr>
<td>31.</td>
<td>I listen to other people’s points of view before putting my own forward.</td>
</tr>
<tr>
<td>32.</td>
<td>I tend to be open about how I am feeling.</td>
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<tr>
<td>33.</td>
<td>In discussions I enjoy watching the manoeuvring of other participants.</td>
</tr>
<tr>
<td>34.</td>
<td>I prefer to respond to events on a spontaneous, flexible basis rather than plan things out in advance.</td>
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<tr>
<td>35.</td>
<td>I tend to be attracted to techniques such as network analysis, flow charts, branching programmes, contingency planning, etc.</td>
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<tr>
<td>36.</td>
<td>It worries me if I have to rush out a piece of work to meet a tight deadline.</td>
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<td>37.</td>
<td>I tend to judge people’s ideas on their practical merits.</td>
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<tr>
<td>38.</td>
<td>Quiet, thoughtful people tend to make me feel uneasy.</td>
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<tr>
<td>39.</td>
<td>I often get irritated by people who want to rush headlong into things.</td>
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</table>
40. It is more important to enjoy the present moment than to think about the past or future.

41. I think that decisions based on a thorough analysis of all the information are sounder than those based on intuition.

42. I tend to be a perfectionist.

43. In discussions I usually contribute lots of creative ideas.

44. In meetings I put forward practical, realistic ideas.

45. More often than not, rules are made to be broken.

46. I prefer to stand back from a situation and consider all the perspectives.

47. I can often see inconsistencies and weaknesses in other people’s arguments.

48. On balance, I talk more than I listen.

49. I can often see better, more practical ways to get things done.

50. I think written reports should be short, punchy and to the point.

51. I believe that rational, logical thinking should win the day.

52. I tend to discuss specific things with people rather than engage in social conversation.

53. I like people who have both feet firmly, practically ‘on the ground.’

54. In discussions I get impatient with irrelevant details and people who get off the point.

55. If I have a report to write, I tend to produce lots of drafts before settling on the final version.

56. I am keen to try things out to see if they work in practice.

57. I am keen to reach answers via a logical approach.

58. I enjoy being the one that talks a lot.

59. In discussions, I keep people to the point and dislike ‘crazy’ off-the-wall proposals.

60. I like to ponder many alternatives before making up my mind.

61. In discussions with people I often find that I am the most dispassionate and objective.

62. In discussions I am more likely to listen, rather than to take the lead and do most of the talking.

63. I like to be able to relate current actions to a longer-term bigger picture.

64. When things go wrong I am happy to shrug it off and learn from it.
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<td>65.</td>
<td>I tend to reject wild, creative ideas as being impractical.</td>
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<tr>
<td>66.</td>
<td>It’s best to analyse the situation before taking a decision.</td>
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<tr>
<td>67.</td>
<td>On balance, I do the listening rather than the talking.</td>
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<td>68.</td>
<td>I tend to be tough on people who find it difficult to adopt a logical approach.</td>
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<tr>
<td>69.</td>
<td>Most times I believe the end justifies the means.</td>
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<td>70.</td>
<td>I don’t mind hurting people’s feelings so long as the job gets done.</td>
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<td>71.</td>
<td>I find the formality of having specific objectives and plans stifling.</td>
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<td>72.</td>
<td>I’m usually the ‘life and soul’ of the party.</td>
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<td>73.</td>
<td>I do whatever is expedient to get the job done.</td>
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<td>74.</td>
<td>I quickly get bored with methodical, detailed work.</td>
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<td>75.</td>
<td>I like exploring the basic assumptions, principles and theories underpinning things and events.</td>
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<td>76.</td>
<td>I’m always interested to find out what other people think.</td>
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<td>77.</td>
<td>I like meetings to be run on methodical lines, sticking to the laid-down agenda, etc.</td>
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<td>78.</td>
<td>I steer clear of subjective and ambiguous topics.</td>
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<td>79.</td>
<td>I enjoy the drama and excitement of a crisis situation.</td>
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<td>80.</td>
<td>People often find me insensitive to their feelings.</td>
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</tbody>
</table>
Scoring the Learning Styles Questionnaire

In each column, circle the question numbers for which you answered "Y" on the preceding questionnaire. Then add up the total number of points you scored in each column and put the amount on the total line. Compare your results to the learning styles key on the next page.

Circle the numbers below that correspond to your 'YES' answers.

<table>
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<tr>
<th>I</th>
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<td>80</td>
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Totals by column
**Key to Learning styles**

The column numbers on the previous page relate to the Learning Style Type. Enter your totals for each column.

<table>
<thead>
<tr>
<th>Type I</th>
<th>Type II</th>
<th>Type III</th>
<th>Type IV</th>
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</thead>
<tbody>
<tr>
<td>Concrete</td>
<td>Reflective</td>
<td>Abstract</td>
<td>Active</td>
</tr>
<tr>
<td>Experience</td>
<td>Observation</td>
<td>Conceptualisation</td>
<td>Experimentation</td>
</tr>
<tr>
<td>(Activist)</td>
<td>(Reflector)</td>
<td>(Theorist)</td>
<td>(Pragmatist)</td>
</tr>
</tbody>
</table>

The highest number(s) will indicate your preferred learning style(s). Refer back to Chapter 3 in order to ascertain the implications for your preferred learning method.
COURSE EVALUATION

COURSE: EP-06
Providing Emergency Support and Advice – UNHCR

Date you finished the course: _________________________________________________

What is your present position? ______________________________________________

How many years have you spent in disaster-related work? _______________________

How many years of formal education do you have?
☐ 0 to 6 years          ☐ 7 to 12 years          ☐ 12 to 16 years          ☐ more than 16 years

How was the content level of this course?
☐ too difficult          ☐ about right          ☐ too easy

Was the course material relevant to your work?
☐ yes        ☐ no

How useful were the self-assessment tests to you?
☐ very useful          ☐ OK          ☐ not useful

How valuable was the total course?
☐ very valuable          ☐ of some value          ☐ not valuable

Additional comments: _________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

Please copy and return this form by mail or fax, or e-mail the information to:
University of Wisconsin–Disaster Management Center
432 Lake Street
Madison, Wisconsin 53706, USA
Fax: 1-608-263-3160    E-mail: dmc@engr.wisc.edu
Examination Request Form

This exam must be proctored (supervised) just as it would be for a course taken on campus. Generally, proctors do not charge for this service. In all cases the academic department offering the course must approve the choice of proctor. Qualified proctors include university or college registrars, deans or counselors or professors; high school principals or counselors; directors of educational services at universities, other educational organizations, correctional institutions or the armed services; certified librarians in a supervisory position; or the delegated officials at university testing centers. Students residing outside of the United States may also request, as their proctor, a local director of educational services or an officer of the United States embassy or consulate. Please copy this form as needed.

Date Submitted
________________________________________________________________

Course Title
________________________________________________________________

Student Information:

Name
________________________________________________________________

Mailing Address
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Proctor Information:

Name
________________________________________________________________

Title
________________________________________________________________

Organization
________________________________________________________________

Complete Mailing Address (Please provide street address, in case courier service is used.)
________________________________________________________________

________________________________________________________________

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Phone Number OR

Email Address
________________________________________________________________

Please return this form by mail or fax, or send the information via e-mail to:
University of Wisconsin–Disaster Management Center
432 Lake Street
Madison, Wisconsin 53706, USA
Fax: 1-608-263-3160 E-mail: dmc@engr.wisc.edu