

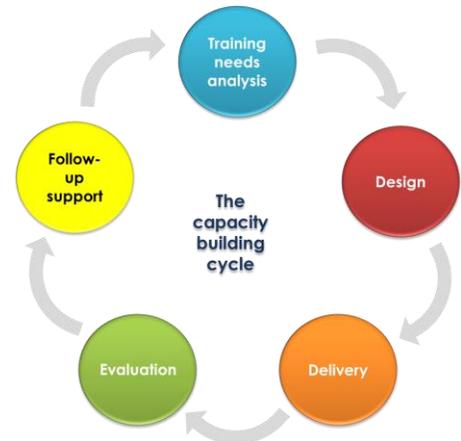
Developing Skills for Capacity Building (DSfCB)

A bespoke training program designed for UN system staff engaged in building capacity and facilitating learning

Kellow Learning has designed a train-the-trainer program for organizations in the UN system to develop the skills of staff engaged either in capacity building, training or facilitation of workshops.

This program is based on Kellow Learning's experience with UNEP and UNDP, and of delivering a similar program for staff engaged in capacity building activities at the Secretariat of the UN Convention on Biological Diversity (CBD). The feedback from the organizers and participants in this program was extremely positive.

The Developing Skills for Capacity Building (DSfCB) program, focuses on consulting and stakeholder engagement tools and methods required to develop and enhance staff skills around the capacity building cycle: gathering and analyzing participants' needs, designing capacity building programs, delivering the program, evaluating the different levels of impact of the program, and providing follow-up support. Further details can be found on page 3.



We offer a highly customized program based on collection and analysis of the learning needs of the participants. DSfCB is an innovative and dynamic blended program combining face-to-face and virtual sessions, learning theory, skills practice, and sharing of participants' knowledge and experience, input from participants and facilitators. Kellow Learning believes in the power of collective learning. The way in which we deliver the program provides participants with a memorable demonstration of how to facilitate learning effectively.

The standard program requires 18 working days for the two Kellow Learning assigned consultants, which at standard UN rates for senior consultants fees results in a total of US\$10,800.

The program was delivered successfully at the CBD, where we have received the following feedback:

Thanks very much for the report of the two workshops and for the superb job you did. As clearly demonstrated by the evaluation results, almost all the staff who attended found the workshop to be very useful. We look forward to continue working with you improve the way we design and deliver our training.'

Erie Tamale, CBD Capacity Building Task Force and main counterpart at the CBD (erie.tamale@cbd.int)

'Having participated in the training workshops ably facilitated by Edward Kellow and Matias Linder of the Kellow Learning Network, I know feel more confident that I can explain how I work with developing country partners to improve their ability to plan for biodiversity. I am sure that all of my colleagues who participated in the training course have had their capacity to build capacity improved by the course and this Handbook will serve to further reinforce the valuable experience that Edward and Matias provided for us –thank you!

Atsuhiko Yoshinaka, Global Coordinator and CBD Capacity Building Task Force (atsuhiko.yoshinaka@cbd.int)

The overall rate of satisfaction with the program was 84%. Some of the comments made on the evaluation questionnaires included:

'Best course I have ever participated at'

'Learned a lot and will use learning in future'

'Great facilitation and interaction between facilitators'

'Very successful'



Developing Skills for Capacity Building (DSfCB) – the program

I. INTRODUCTION, TASKS AND DELIVERABLES

The DSfCB consists of consulting and engagement tools and techniques that will improve staff skills in designing and conducting effective capacity building activities, training and/or facilitating workshops.

The program is structured following the training life cycle that, in turn, reflects principles of the work that should be carried out by staff in capacity building activities.

Tasks:

1. Review the training needs of staff with respect to planning and conducting capacity building activities.
2. Conduct a webinar to review the results of the training needs analysis.
3. Conduct a 3-day workshop for staff on designing and delivering capacity building activities, taking into account the staff needs.
4. Develop a handbook for staff on designing and delivering effective capacity building activities.
5. Conduct a webinar to provide follow-up support and demonstrate how follow-up support can be provided.

Deliverables:

1. An inception report
2. Training materials (PowerPoint presentations and worksheets) on designing and delivering effective capacity building activities
3. A report on the 3-day workshop for staff
4. A handbook on designing and delivering effective capacity building activities

The total duration of the consultancy is 18 working days spread over a period of 2-3 months, to be agreed with the client organization. The program is delivered in English.

II. METHODOLOGICAL APPROACH

General approach to working with the client organization

We develop a close partnership with the person/team/staff that is responsible for capacity building. We work together throughout the process of needs analysis, and program design, delivery, handbook writing, evaluation and follow-up. We commit to:

- Create a powerful learning experience that will help staff to think and act more effectively by connecting staff on the intersection of process and content.
- Build trusting relationships and inspire participants to be creative and resourceful so that the objectives of the program are met. Our goal will be to make the learning from this program sustainable.
- Create a learning experience that is learner focused and highly participative, working with the participants to help them create the best possible learning solutions, and build their confidence so that they will be able to design and deliver capacity building programs with impact.
- Create opportunities for staff to experiment, and then reflect on what they have learned. Working in this way will help them to discover what they know, increasing their confidence, overcoming problems and barriers, and being able to put into practice what they have learned.
- Give what we expect of our course participants: honesty, openness and authenticity, enabling trust and inclusion, which are essential for collaborative working.
- Write an engaging and user-friendly handbook in plain English that will contain a compelling mix of training theory and practice, and a multitude of tools and tips drawn from our own experience of working with culturally diverse groups all over the world.



Methodology

Our approach to the program is systematic, using the training cycle (needs analysis, design, deliver, evaluate and support) as general framework. We will adopt the following process for delivering the expected outputs and outcomes:

a. Entering and engaging

As soon as the contract is awarded, we will spend the necessary time for getting to know all relevant parties, understanding their interests and expectations, building rapport and planning the first steps of the project. This is normally done over the telephone, Skype or an equivalent virtual tool.

b. Analysis

We believe that developing a comprehensive understanding of the requirement is essential for designing and delivering a high quality service. For this reason, we will dedicate sufficient time to understanding the current practice of capacity building through desk review and surveying staff engaged in capacity building activities, evaluating strengths and weaknesses, and diagnosing the current level of service provided by interviewing recent-past beneficiaries. At this stage we will write the inception report which, in agreement with the client's counterpart, will establish clear expectations for the project, identify the gaps (including tools, knowledge, skills and motivation) and establish the plan to fill those gaps resulting in a significantly improved way for the client to plan and deliver training.

c. Design of workshop

The foundation of this train the trainer course is Kolb's theory of learning: we will ensure that program participants learn to consciously and repeatedly go through the process of having an experience, reflecting upon it, drawing conclusions and testing them out. We create an experiential learning journey during which we use this program that staff will be experiencing as a dynamic case study. We will show staff how we have integrated best practice in the design of this course by looking under the bonnet that covers the program design. We show them how we apply the underpinning theories and concepts to the design and sequencing of the learning activities, and the factors that influence our choice of training tools and methods. We show them how to use the training cycle (Needs analysis, Design, Deliver, Evaluate and Support) as a framework for planning and delivering capacity building activities, guiding them through each stage of the cycle systematically. Working in this way helps staff understand our design choices, and will facilitate the transfer of learning because staff will be learning from doing. During the face to face workshop we provide opportunities for staff to select and practice using the exercises and tools that work best for them. We will use participants' materials to work during the training so that participants can use this program as an opportunity to improve their own work.

d. Delivery of workshop

During the delivery of the workshop we model good practice for co-facilitation, and demonstrate how to work with learners in a collaborative, respectful, and empowering way, paying attention to sensitivities arising from working in multi-cultural contexts. Our aim is to share our knowledge and experience with a light touch, responding flexibly to the needs of the group in order to help learners achieve their learning objectives. We do everything possible to ensure that the learning environment, and the learners' experience, mirrors what we recommend in the handbook. In other words, we 'walk the talk'.

e. Train the Trainer Handbook

Following we are showing the draft structure and contents for the Handbook, which will be adapted to the organization on the basis of the needs analysis, the practice and learning experienced through this project:

Welcome Page	- Letter from Client / Sponsor
	- Welcome note from Trainers
	- How to use the handbook
	- Visual showing how handbook is structured



<u>Part one</u> Training Needs Analysis	<ul style="list-style-type: none">- Why carry out a Training Needs Analysis (TNA)- Working with your client / learners to agree aims and objectives- SMART objectives- Different methods, advantages and disadvantages- Helpful questions- How to write measurable behavioural learning outcomes- How to encourage learners to identify personal learning goals- Examples, exercises
<u>Part two</u> Planning Learning Activities	<ul style="list-style-type: none">- Adult learning theory, Kolb's theory of learning, learning styles- Selecting training tools and methods to deliver the agreed aims and objectives- How to create a training plan, how to select and order activities in order to create an inspiring and engaging learning journey- Types of exercise and when to use them: case studies, role plays and simulations, quizzes, teambuilding exercises, peer to peer coaching, icebreakers and energisers- Examples, training plan templates- Presentation skills, using PowerPoint or equivalent, room layout, using wall space effectively- Essential training resources - what to include in a trainers' toolbox- Training handouts, good practice for writing handouts
<u>Part three</u> Delivering Training	<ul style="list-style-type: none">- The role and responsibilities of a trainer, difference between training and facilitation- Co-training and co-facilitation: building a working relationship- Training styles, Heron- How to build rapport and trust with groups and individuals, co-creating ways of working (agreements)- Listening and types of question: clarifying, summarising, challenging, reflecting back- How to create an inclusive, empowering learning environment- Understanding group dynamics, Tuckman, ice-breakers energisers, managing difficult behaviour- Time management: keeping to time and when to stop for a break
<u>Part four</u> Evaluation training and learning activities	<ul style="list-style-type: none">- How to integrate feedback and evaluation into program design and delivery systematically- Kirkpatrick's levels of evaluation- When and how to use different evaluation tools and techniques, advantages and disadvantages of paper and online evaluation forms, design and timing, video, creative approaches to evaluation- How to encourage learners to reflect on, and capture their learning- How to involve learners in post-workshop follow-up strategies, timing, online forums, blogging, video diaries, learning logs and journaling- How write an evaluation report, structure and content, how to tailor evaluation reports for different stakeholders- Afterword – Message from Trainers, congratulations- Ten tips for developing yourself as a trainer
Additional learning resources	<ul style="list-style-type: none">- Templates e.g. example training plan, example learning log, example feedback form- Learning resources for trainers, reading, URLs, TED Talks- Space for participants to make notes

f. Evaluation

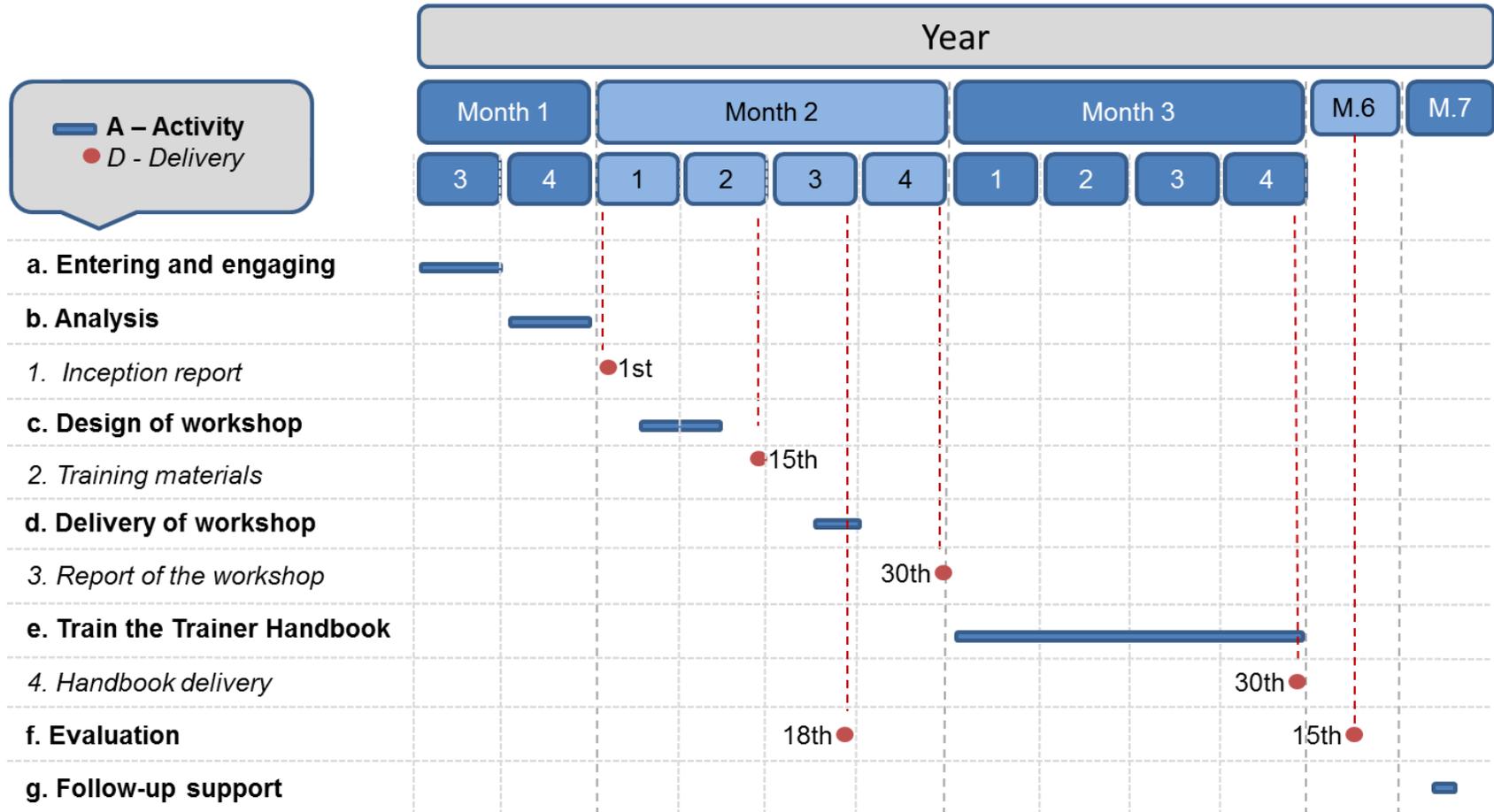
Our approach to the project is to work in close partnership with the client, involving ongoing dialogue between the parties to ensure that the project is constantly directed to the desired expectations. The fact that our proposal structures the project as a process where each phase informs the following one ensures that each of the project phases comes to an end and informs the following phase according to pre-established expectations. On top of this there will be formal evaluations through the use of questionnaires for the workshop, the handbook and a final evaluation a few months after the end of the project to understand the impact of our intervention.

g. Follow-up support

We take a systematic approach to helping learners apply their learning and use a number of tools and systems to develop and maintain a knowledge community, engaging learners in the process of applying and reinforcing their learning.



III. PROVISIONAL WORK PLAN





IV. FINANCIAL PROPOSAL

The standard program for DSfCB requires 18 working days from Kellow Learning Consultants for the following work:

	n ^o of days
a. Entering and engaging	2
b. Training needs analysis and inception report	4
c. Design of workshop	2
d. Delivery of workshop	6
e. Train the trainer handbook	2
f. Evaluation and report on workshop	1
g. Follow-up support	1

The DSfCB is a bespoke program designed to help UN system staff improve the way they plan, deliver and follow-up their capacity building activities. The standard program and required number of days for Kellow Learning consultants, as structured above, include further customization for the specific UN body where the program is implemented. During the entering and engaging phase the consultants will identify the specific needs of the organization and on that basis will carry out an adapted needs analysis, which in turn will inform the final design of the program, the face-to-face workshop, the contents of the trainer handbook and follow-up activities.

In the case the client organization would like to have several groups of staff to be trained or to further adapt the standard DSfCB, the scope and structure of the program could be expanded as required.

The daily fees per consultant are US\$600. On top of fees, client organizations will need to cover travel and accommodation expenses, as per current UN travel policy rules.

V. PROGRAM SCHEDULE

*'Tell me and I will forget
Show me and I will remember
Involve me and I will understand'*
Confucius

This is a participative program that balances technical input, skills practice, and peer2peer learning. The content of the program is grouped according to the five stages of the capacity building cycle: learning needs analysis, program design, delivery, evaluation and follow-up support. Working in this way helps learners to realize the importance of taking a systematic approach to delivering capacity building activities.

The program is also about learning from doing because we believe this is the most effective way to develop skills for capacity building. The design of the program takes participants on a 3-day learning journey that involves capacity building theory, techniques, skills practice, feedback, and peer2peer reflection. Days 1 and 2 are about acquiring capacity building theory, facilitation skills and tools for engaging groups. Day 3 is the culmination of the program. Participants practice their newly acquired knowledge and skills by delivering a short capacity building session that they designed on day 2. Each participant receives individual feedback on their design and delivery skills from the trainers, and from the group.

For participants, the opportunity to design and deliver a capacity building session, and to receive individual feedback from the trainers and their peers, is a powerful and memorable learning experience. We believe that engaging and involving participants in a collective learning experience is the most effective way to enhance and develop skills. Participants will leave the program feeling confident that they have acquired the skills to deliver highly effective capacity building activities in the future.



Indicative schedule (two facilitators and up to 16 participants)

Day 1	Day 2	Day 3
<ul style="list-style-type: none"> ▪ Welcome & introductions ▪ Sharing expectations ▪ Reviewing the learning journey 	<ul style="list-style-type: none"> ▪ Agenda for the day ▪ Reflections on learning so far ▪ Q & A 	<ul style="list-style-type: none"> ▪ Agenda for the day ▪ Final preparation for skills practice ▪ Giving and receiving feedback (input)
<ul style="list-style-type: none"> ▪ Defining training, learning and facilitating ▪ Sharing good & bad experiences of capacity building (group exercise) 	<ul style="list-style-type: none"> ▪ Presentation skills, effective use of presentation tools, learner friendly materials (knowledge input and practice) 	<ul style="list-style-type: none"> ▪ Skills practice in pairs and feedback from the group (skills practice)
<ul style="list-style-type: none"> ▪ Training needs analysis (theory and practice) 	<ul style="list-style-type: none"> ▪ Systematic approach to designing a training plan (theory and skills practice) 	<ul style="list-style-type: none"> ▪ Skills practice in pairs and feedback from the group (skills practice)
<i>Lunch</i>	<i>Lunch</i>	<i>Lunch</i>
<ul style="list-style-type: none"> ▪ Measurable learning aims, objectives & outcomes (theory and skills practice) 	<ul style="list-style-type: none"> ▪ Evaluation theory, tools and techniques, providing ongoing support to learners (theory and knowledge sharing) 	<ul style="list-style-type: none"> ▪ Skills practice in pairs and feedback from the group (skills practice)
<ul style="list-style-type: none"> ▪ Engaging and motivating adult learners (theory and practice) 	<ul style="list-style-type: none"> ▪ Participative training tools and techniques (theory and knowledge sharing) 	<ul style="list-style-type: none"> ▪ Ongoing support to learners: online & peer2peer
<ul style="list-style-type: none"> ▪ Facilitation skills and group dynamics, listening and questioning skills (theory and practice) 	<ul style="list-style-type: none"> ▪ Pair work: Participants plan and prepare mini-training sessions to be delivered on day 3 (skills practice) 	<ul style="list-style-type: none"> ▪ Participants review progress towards individual learning goals & create personal action plan for the future
<ul style="list-style-type: none"> ▪ Learning review 	<ul style="list-style-type: none"> ▪ Learning review 	<ul style="list-style-type: none"> ▪ Closure

Key Principles: Learning from doing

1. The program will be delivered collectively - the trainers will work in partnership with the participants and will use the participant's existing materials in order to meet their learning needs effectively
2. Participants will all have a chance to apply what they have learned during the program
3. The trainers will work transparently and inclusively with the group –throughout the program the trainers will clearly communicate the why, the what, and the how of their approach, which, in turn, is being used as an example of a capacity building program
4. The trainers will maximize opportunities for the participants to practice their training and facilitation skills in the group e.g. participants will co-deliver training sessions and learn from and with each other
5. Facilitating learning in multi-cultural environments will be dealt with throughout the program.



VI. CAPABILITY STATEMENT

Edward Kellow and Matias Linder are the allocated team of consultants from the Kellow Learning network who will be managing the CBD project. The two consultants have worked together in different projects for the good part of the last three years. They have demonstrated their ability to be an innovative and successful team in designing and delivering training activities. Following we are describing their expertise and experience as individuals, and their strengths working as a team.

Edward Kellow

Edwards holds an MA in French and Russian. Later on he studied further, and gained a Postgraduate Diploma in Personnel Management, a Training and Development Lead Body Level 4 NVQs, and a Postgraduate Certificate in Human Resource Development. More recently he obtained an Advanced Diploma in Executive Coaching, Academy of Executive Coaching (AoEC) with Merit for Presentation.

Edward started off his career as intelligence officer, he then trained and supported HIV/AIDS volunteers in East London, and set up an innovative greetings card business, Twisted Yarns. He then developed in his career becoming a highly creative, energetic and outcome focused trainer, facilitator and coach, specializing in leadership, train the trainer, communications, and change. He has decades of experience of face to face learning, and more recently, e-learning training course design, and online coaching and mentoring. He specializes in creating powerful learning networks that continue to learn and grow beyond the life of a course or program.

During most of the past 8 years Edward was Head of Learning and Leadership at LEAD International, the world's largest not-for-profit leadership and sustainability network. While at LEAD, Edward led and supported the learning of a global network of sustainability trainers who attended train the trainer courses designed by him as part of a program of continuous learning. He designed and delivered train the trainer, and global leadership programs for up to 150 participants in Africa, Asia, Europe, North & South America, China. He has delivered training in English, French and Russian.

In 2012, Edward designed a course on Sustainable Cities for Rio+20 that won the international public vote for the best learning event. He has also delivered leadership programs and workshops for many intergovernmental, business and third sector organizations, including the British Council, Kumtor Gold, The Environment Agency (UK), Forum for the Future, Newmont Mining, Ofwat, Oxford University, the Sustainable Development Commission (SDC), UNDP, UNEP and IUCN.

Edward has a successful track record of designing, delivering and evaluating train the trainer programs for a large number of different organizations including an advocacy and stakeholder engagement training program for UNEP, delivered in Kenya, Botswana, Senegal and Burkina Faso, and the training of hundreds of young leaders for the British Council Climate Generation program, developing their training skills so that they could cascade the training all over the world.

Matias Linder

Matias holds a Bachelor's degree in Human Resources Management and a Post-graduate Certificate in Organizational Development and Change. He has worked in his areas of study for 20 years in different industries, including consultancy, the Corporate Headquarters of a large Spanish multinational, and International Organizations of the European Union. He has also worked in international cooperation and developed learning programs for non-for-profit organizations.

Matias was trained in *training and development* during his university studies, has learned various diagnosis, learning and development intervention methodologies during his post-graduate studies, and has taken several training courses throughout his career on presentation skills, facilitation of workshops, working in multi-cultural environments, team-building, leadership, team working, development of competencies and competency models, etc.

During his years in consultancy Matias started by designing and delivering training courses on human resources matters. Later on, working at corporate headquarters of a large multinational, he was responsible for implementing corporate Management Development policies in Latin America and Italy. For most of the past 11 years, Matias was responsible for the Learning and Development function at European Union Institutions. As such, Matias was responsible for designing the Learning and Development strategy of both organizations, designing the corresponding training and development policies, developing leadership and staff development programs, managing the training budget and personnel, procurement of training providers, etc. Furthermore, Matias was responsible for the Performance Management function, designing methodologies for capturing training and development needs, for which he trained and worked closely with leadership for ensuring the correct implementation of methodologies.

In the recent past, Matias conceived, coordinated and co-facilitated LEAD's (www.lead.org) Portugal learning challenge. He has also developed training and development programs for the Portuguese subsidiary of the Jesuit Refugee Service and developed an incubation program for sustainable businesses.



Our strengths as a team

- Highly experienced learning and development professionals: together we have decades of experience of capacity building in different countries and contexts. We have both worked for UN and multilateral organizations in the area of leadership learning and biodiversity. We both have post graduate qualifications in Human Resource Development, and also executive coaching and training.
- Shared values and beliefs in learning and change: we believe that the need for change is urgent in order to create a more sustainable future for all. We believe that people can learn and change, and can be helped to overcome internal and external obstacles and challenges. We offer what we look for in learners: openness, authenticity, enthusiasm and the perseverance and commitment needed to ensure that essential knowledge and skills are transferred, and that learning outcomes are achieved.
- Track record in delivering blended learning programs in different countries and regions: we have co-designed and delivered a successful sustainability leadership program in Portugal. Separately we have managed learning programs and activities in Africa, West and Eastern Europe, South East Asia, North and South America.
- Culturally sensitive and multilingual: we have years of experience of working with culturally diverse groups and between us we speak good English, Spanish, Portuguese, Russian, German, Italian and French.
- Able to inspire and engage learners: we both have the ability to build trust and relationships with learners, an essential quality when working in training and consultancy.

Working together, we are able to use our different but complimentary cultural identities, knowledge and experience to create positive and enabling learning environments for all.

Matias is by nature and, through his studies and experience in organizational development, a trained strategist. As such, he is very strong at “reading” and understanding organizations, identifying their needs and problems and designing strategies for efficiently overcoming/solving them.

Edward’s strengths, in turn, lie in the operational aspects of training: designing training courses/workshops, facilitating them, and making use of a long list of different methodologies for leading groups through their learning journeys. Most importantly, he is very strong at developing a highly energizing group dynamic, and creating an inclusive and creative learning space that enables participants to ask questions, apply knowledge and practice new skills. Edward excels at enhancing existing skills and knowledge, and in facilitating knowledge sharing and peer2peer learning. These skills will be important for helping the client’s staff to improve the way they provide follow-up support to their trainees. Furthermore, since 2006 Edward has written and edited over twenty training handbooks for LEAD Europe, the LEAD Africa Fellowship Program, Newmont Mining, the British Council and Greener Museums.

Considering our strengths, we are confident that we can design a high quality training program that meets CBD’s objectives. Working as a team, we will ensure that the project is managed and evaluated to the highest professional standards. Matias, supported by Edward, and working together with the client, will be responsible for analyzing and diagnosing the current level and quality of the training delivered by the CBD. He will establish clear expectations for this project, identify gaps, and designing strategies for overcoming gaps. Edward, supported by Matias, and working together with the client, will design the workshop with input from the client’s staff, lead the facilitation of the workshop, and lead the writing of the handbook.