

## GUIDELINES FOR THE ORGANIZATION OF TRAINING COURSES, SEMINARS AND WORKSHOPS

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### Introduction

Training courses, seminars, and workshops can serve several purposes. Courses can indicate different ways of solving problems, and provide new information, new methods, new ideas, new insight, different points of view and better understanding of the problem itself. Meeting together, people with common goals can decide on joint programmes of action.

A course or workshop must be planned if it is to be successful - both to the planners and to the participants.

A successful course can be likened to an iceberg - three-fourths of it below the surface. The one-fourth that does show is often taken for the whole iceberg. The unseen three-fourths (planning, organization and evaluation) are generally more important in the long run.

### Critical Tasks

Before stating the guidelines it will be useful to list the critical tasks in the organization and conduct of training courses, seminars, and workshops.

Critical task 1: A course "style" must be chosen: full or part-time, timing, duration etc.

Critical task 2: The instructional method must be appropriate to the course style.

Critical task 3: The course must be planned with an agency responsible for manpower planning to insure that it will fulfil an identified need.

Critical task 4: The course prospectus must attract participants and be a clear description of the course.

Critical task 5: Selection of participants is as important as choice of instructional method.

Critical task 6: The successful conduct of the course depends on the instructor and the types of material and assignments chosen.

Critical task 7: Meeting room arrangements must be optimum.

Critical task 8: Coordination and follow-up with government agencies and supervisors of participants are essential in the planning stage, during the course, and after it has been evaluated.

Critical task 9: Evaluation of participants should be made during, at the end, and several months after completion of the course.

### Guidelines

There are four main stages in the organization of a training course or workshop.

1. Planning and Preliminaries
2. Organizing for the course
3. Implementing the course
4. Evaluating the course and other post-course activities.

Planning and Preliminaries: Planning is a process in which the present situation is carefully examined and preparation is made for changing the situation. The success of any course depends to a large extent on the soundness of planning for the course.

Guideline 1: Information about needs for course must be gathered and analyzed. "Needs" can be defined as the gap between present level and desired (or required) level of ability of individuals or the organization (i.e. library, information centre, agency etc.) in meeting its responsibilities. All possible sources of information should be considered in determining what the problem and needs are. Classification of the gathered information will aid interpretation and evaluation.

Guideline 2: Course objective must be formulated. Sound objectives provide a firm basis for the decisions that will be necessary at each stage of the course. Objectives should be clear, concise, and stated explicitly with no possible misunderstanding of intent. Usual statements such as "to improve performance" are vague and do not provide an adequate base on which to develop a course.

Guideline 3: Resource needs must be assessed. The kinds of resources usually needed for a course include physical facilities, equipment, supplies, materials, funds and most important of all, people. Those resources already available can be an important factor in planning the programme, and should be taken into consideration.

Guideline 4: The Organizing Committee must be appointed. Persons on such a committee will normally have some special abilities or experience in the details of course management (such as registration, publicity, evaluation). The Committee should also include representatives of group which is to benefit from the course.

Guideline 5: Sponsorship must be attained. Appropriate national and international agencies should be approached to obtain sponsorship. This will ensure a better course plan and a more coordinated approach to the needs for education in a country.

Guideline 6: An action plan for the course must be designed. An action plan will include a list of several decisions needing action. For example:

1. Language of instruction
2. Scope and level of course content
3. Length of course
4. Time of year for course
5. Place for course sessions
6. Place for lodging and meals
7. Pre-course distribution of learning materials
8. Selection of groupings for course sessions
9. Choice of instructor(s) and other resource persons
10. Equipment and other facilities required
11. Plan for monitoring course's progress and participant satisfaction
12. Time sequence for publicity, course prospectus (with application), choice of participants, collection of registration information, post course publicity
13. Budget and accounts for funds to be raised by grant, subsidy, or fees
14. Maximum number of participants: their specific qualifications, if any.

The following checklist should be helpful to review the complex process involved in designing an action plan.

Checklist for the initial planning stage

1.  Have you written a preliminary statement of objectives?
2.  Have you set preliminary dates for the Courses?
3.  Have you determined what type of course and how many people will attend?
4.  Have you estimated budget?
5.  Have you attained sponsorship?
6.  Have you tentatively decided on a course venue?
7.  Have you assessed appropriateness of facilities and availability of equipment at the venue?
8.  Have you listed the sequence and the subjects to be covered in the course?

9.  Have you chosen instructor/s? Other resource personnel, such as discussion leaders, recorders?
10.  Have you determined qualifications of participants?
11.  Have you decided on language of instruction and length of course?
12.  Do you have an overall action plan and schedule of events from this point onwards?

Organization for the course: Decisions concerning the who, what and how of the implementation of the course should largely be determined on the basis of what is best in terms of fulfilling the objectives. The Organizing Committee and especially the Course Coordinator, a single individual, will have to make several decisions before the instructors and participants appear on the scene.

Guideline 7: Administrative responsibilities must be assigned and a secretariat formed. The management and coordination of the course should be an assigned responsibility of an individual or a group forming a secretariat, from within the agency for which the course has been designed.

Guideline 8: Course announcement must be drafted and distributed. A clear and attractive advance announcement must be drafted and circulated to draw the attention of prospective participants.

Guideline 9: Training staff must be selected and organized. Training staff should be two different categories of competence:

- content resource - persons with competency in specialized areas of knowledge or technical skills
- methods resource - persons with ability to design a wide range of educational activities which promote learning in accord with established objectives.

Guideline 10: Participants must be screened and accepted. The participants should be selected for the course on the basis of the identified needs from which the course objectives were developed. An application form would be extremely helpful for screening applications. A formal committee could be established to do the screening.

Guideline 11: Availability of adequate facilities and the required equipment must be determined. It is important that supportive elements (facilities and equipment, comfortable seating, learning materials, etc.) be carefully coordinated and creatively used by the teaching staff to enhance the learning opportunities being developed in the course.

Guideline 12: Pre-course material, if any, must be prepared early and distributed to participants.

## Checklist for organizing the course

13.  Have you established a schedule for administrative tasks to be performed?
14.  Have you sent out preliminary course announcement? final course brochure?
15.  Have you reached agreement with training staff on course outline, learning activities, facilities and arrangements?
16.  Have you screened applications and sent acceptance letters with follow-up instructions?
17.  Have you distributed pre-course material, if any, to participants?
18.  Have you confirmed facilities and equipment availability for course? and living accommodation (if any)?
19.  Have you arranged for transportation? special dietary menus? living quarters?
20.  Have you arranged for registration/hospitality on first day of course?
21.  Have you sent out press release?

Implementing the course: Implementation of the course does not mean that all planning is concluded. Although the bulk of the planning may be done before implementation begins, each of the phases overlaps the other.

Guideline 13: Scheduled rooms for course must be checked out for satisfactory size, ventilation, electrical outlets, furniture, seating arrangements.

Guideline 14: Final time schedule for course activities must be determined and distributed to all participants. The daily schedule, with assignments for staff and participants should be part of the materials prepared for the course. This is a critical task as the time schedule.

The time table presented to the teaching staff, especially if they are outside resource personnel, would include such additional information as the following;

1. the actual attendance and composition of the participants
2. how the course is planned in toto
3. anything that has happened which might affect presentation such as questions or problems which have already been raised
4. who will introduce the resource personnel
5. information about the aids which has been requested, such as chalk-board, easel, overhead projector, etc.

Guideline 15: Educational activities must be stimulating for intended audience and promote discussion and exchange of view. Participants although having the necessary educational background and experience are not usually ready to plunge into discussion early in the course. Before the typical participant starts to take part in the question-and-answer discussion, he needs to become involved and identified with the group so that he will feel at ease. Participants will have some questions which should be answered.

1. Who is who? Who are the other participants? How do the participants compare in terms of background, on-the-job skills, and experience?
2. Where do I fit in? What's expected of me? How am I supposed to participate? How much am I expected to contribute? Do I just sit and listen or am I expected to talk?
3. What is the purpose of this course? What are the goals and objectives? Who designed the course? What are we expected to accomplish?

There are three basic problems which account for the failure of most question-and-answer periods and should be overcome.

1. The problem of communication
2. The problem of putting information to work
3. The problem of collecting information to use in planning future meetings.

Guideline 16: Materials prepared and distributed must be appropriate to illustrate concepts and principles which apply in actual situations. Inappropriate materials can jeopardize the educational objectives of the course. Materials should be clear and understandable to the learner, directly relating to his needs.

Guideline 17: Sequence and pace of instruction should match the variety of capabilities of the participants. Most often the sequence should proceed from simple to complex, with general remarks made for orientation, but for a gradual building to generalization after a number of specific aspects have been covered.

Guideline 18: Learning aids (audio visuals and others as needed) must be in good working order and available when needed.'

#### Checklist for implementing the course

22.  Have you checked the rooms for the course to determine satisfactory ventilation, size, furniture, seating arrangements, etc.?
23.  Is the required equipment at the meeting site and in good working order?
24.  Have you assigned specific persons to the various supportive tasks?

25.  Have the arrangements for meals, refreshment breaks been confirmed?
26.  Have the instructors been briefed? Are there any changes in the time schedule of activities?
27.  Will the pace of instruction and sequence of learning activities be monitored for effectiveness?
28.  Are the handout materials pre-assembled and available on time and in sufficient quantities?
29.  Have welcoming and departure arrangements been made final?

### Evaluating the course and other post course activities

Evaluating methods can provide information about the extent to which a course's impact is what was intended and to discover the means by which that impact was achieved. Two kinds of evaluations are possible. Both may be necessary. The first is course evaluation which is used to provide feedback about the course in process so that it might be adjusted as necessary. The second is results or outcome evaluation, which is used to measure the degree to which objectives have been met. Each of these kinds of evaluation must be planned from the beginning of the course in order to determine what information will be needed, how to acquire that information, and how to use it. Some useful guidelines are given below:

Guideline 19: The purposes for evaluation must be determined.

Guideline 20: The evaluation process (during and after the course) must be planned.

Guideline 21: Reliable and valid evaluation information must be collected, organized and analyzed.

Guideline 22: Evaluation data must be reported and utilized.

Guideline 23: Summary reports must be distributed to participants and other interested parties.

Guideline 24: Follow-up reports could be received from participants at fixed intervals after the course.

Guideline 26: Final contact with training staff should be a cordial affair.

### Checklist for post course activities

30.  Have you decided on the proper form for evaluation of the course? of the instructor? of the participants?

31.  Have you collected and analyzed evaluation data?
32.  Have you written and used the evaluation report?
33.  Have you prepared post course reports to sponsor? to participants? Have participants produced reports?
34.  Have you distributed post course materials?
35.  Have you sent a letter of appreciation to instructors and others who contributed to the conduct of the course?

Reference: UNISIST Guidelines for the organization of training courses, workshops and seminars in scientific and technical information and documentation, UNESCO SC/75/WS/29, Paris April 1975.