

PART II

**IN SERVICE TRAINING
COURSES**

CHAPTER 4

PLANNING AND ORGANISING AN IN-SERVICE COURSE

In this chapter it will be assumed that the reader has been given responsibility as the organiser or director of an in-service course related to the management of schools or school systems. This part of the Handbook offers comment and advice which may be helpful in the planning and organisation of such a course. Bearing in mind the varying circumstances and considerations which will apply in different Commonwealth countries it would not be realistic to seek to provide detailed guidelines so the discussion will inevitably be at a rather general level. Nevertheless, there are some common needs and problems which can be usefully mentioned.

Clarifying Responsibilities

Terms of Reference

If you have been asked to organise a course, it may be assumed that the proposed activity has official approval at least in general terms. The initiative will, in many cases, have come from the Ministry or Department of Education and may be part of a wider policy. It is important for you to know what is expected of you, the resources that are to be available, and the extent of your personal authority in formulating plans and carrying them out. If necessary, you should seek clarification at the outset so that there will be no misunderstanding about your terms of reference or the resource constraints under which you must operate. In particular, the financial arrangements and the level of financial support have to be agreed as well as the amount of time that you yourself will be able to devote to the project and the administrative back-up which you will be given.

Planning Committee

It may well be that you will be expected to work with a Course Planning Committee and this is a matter which will also need to be explored. If the course is for secondary school principals, for instance, it is desirable that the Committee should include several principals chosen because of their potential for leadership, together with some office based administrators or inspectors and any relevant teachers' college or university staff. Such a broadly based and

representative Planning Committee should be welcomed by you on a number of counts:

1. It will have a realistic appreciation of the training needs of the relevant practitioner group.
2. It should be in a position to provide ideas and to make judgement as to how those needs might best be met.
3. Members of such a committee usually prove to be influential allies when the time comes to recruit participants for the course.
4. Committee membership itself contributes to the professional development of potential tutors and organisers of future courses, a multiplier effect being thereby generated.

Committee Role

Some thought needs to be given to the best relationship between yourself as course organiser and the Planning Committee. Different arrangements are possible. Responsibility for the course may be vested in the Planning Committee, the course organiser being simply the executive officer of that Committee. On the other hand the role of the Committee may be purely advisory, the organiser being directly responsible to his employing authority for all matters relating to the course. Whatever the formal position the reality is usually somewhere between those two positions and it is important that you should take trouble, as course organiser, to establish a good working relationship with your Course Planning Committee and any sub-committees which may be established in specialist areas.

Course Objectives and Target Group

Within the terms of reference given to you it will be desirable to have in mind specific objectives for the course. A related question, if this has not already been agreed, is that of deciding the group for whom the course is intended. Supposing that you have been given the general aim of arranging in-service provision to improve the management of primary schools in a region, you might consider arranging a series of in-service courses for primary school principals. In trying to formulate specific objectives for these courses you might decide that the needs of large and small schools (or urban and rural schools) are so different that it is better to arrange separate courses for each group. You might even decide that the highest priority should be given to the provision of a course to improve the competency of the inspectors or area education officers responsible for primary education in the region. The specific course objectives will then depend on the target group chosen.

Heterogeneous Groups Under certain circumstances there would be a case for arranging courses for two or more occupational groups together. If the aim were to tackle the problems involved in the transition from primary to secondary schools, for instance, it would be helpful to include both primary and secondary principals in the course membership. There would also be occasions when it would be salutary for school based and office based administrators to be fellow members of the same course. The specific course objectives would then include the exploration of difficulties and misunderstandings which sometimes arise in their relationships.

It is at the stage of specifying course objectives that a Planning Committee can be most useful. It will be found quite easy to agree on general aims and even to envisage a whole range of desirable objectives, but practitioner members of the Planning Committee will be able to give guidance concerning priorities and the objectives which are realistic in the given context. Even when the practitioners disagree amongst themselves, such differences of view are significant and can provide a useful starting point for identifying issues to be considered on the course.

Attainable Objectives Finally, it cannot be over emphasised that in setting objectives it is better not to be over ambitious. Experience suggests that more may be achieved in the long run by not trying to do everything at once but concentrating on a small number of limited, but attainable, objectives. This has implications for course content which will be considered further in the next chapter.

Planning

Time Span Once the course objectives and the clientele have been decided the planning and preparation can begin in earnest. Preparing for a major international educational conference such as the Quadrennial International Inter-Visitation Programme in Educational Administration, can take several years, but even within the national or regional structure of an individual country one should not under-estimate the time required to mount a worthwhile course which breaks new ground. Experience suggests that such a course is likely to require at least six months from the day the organiser gets his invitation or request to run the course to the opening of the actual proceedings. If distances are great and communication is difficult the time required could be considerably longer.

Flow Diagram Perhaps the best advice that can be given to you as course organiser is that at a very early stage you should write down all the various decisions and steps that have to be taken and then try to arrange them in a flow diagram as was done in the section on the Planning Process in Chapter 3 of Part I. (p.51). Some of the tasks which have to be carried out are discussed later in this chapter but they need to be specified in greater detail according to local circumstances before they can be placed accurately on the flow diagram. Some flexibility will still be desirable but you would be well advised to identify tasks which have to be

carried out in sequence to avoid the possibility of a break in the chain which might result in the course not being ready on time.

Preliminary Decisions

Matters to be decided in the period leading up to the course will include the following:

1. The number of participants.
2. The duration of the course, such as a day over a series of week-ends, or a week or more during the school vacation.
3. A suitable venue, bearing in mind the need for accommodation and catering facilities if the course is to be residential and is to extend more than a day.
4. The determination and development of course content relevant to course objectives.
5. The organisation of the course programme, including decisions on teaching techniques and the use of resource materials.
6. The specialist lecturers and course tutors, all of whom have to be briefed on the specific requirements of the situation.
7. The budget requirements so that the charges to be made can be fixed and funds can be obtained.
8. The information to be circulated about the course.
9. Preliminary instructions for intending participants.
10. The criteria and methods to be used for evaluating the success of the course.

Items 4,5,6 and 10 are essentially professional matters and will be dealt with in Chapter 6. The remaining items are essentially organisational and are dealt with below.

The Number of Participants

The number of those who wish to attend will depend on the theme and scope of the course and on the attractiveness of the programme offered as seen by the potential applicant himself and by those in authority over him. Other considerations will be the proposed length and timing of the course and the distance participants may have to travel.

The number of course members that can be accepted will depend on the accommodation and facilities available at the proposed venue, and may also be limited by the funding provided by the authorities to the organisers.

Because of the many factors involved it is difficult to give a view as to the best number to recruit. Unless the course is highly specialised (e.g., a course for Senior Inspectors) it probably should have at least 20 participants to allow for variety of thought and experience and to make it viable for those providing accommodation and catering. An appropriate upper limit might be, say 60 as numbers beyond that tend to make the course unwieldy and impersonal. In general it may be claimed that the most effective courses are those which are small enough for all members to get to know each other.

Duration and Timing

It is not easy to give a general rule on the duration and timing of training courses because much will depend on local circumstances. With regard to duration, experience suggests that about one week, or to be more precise 5-6 working days might be long enough to put over new ideas and not too long for those who have to come some distance and perhaps give up part of their vacation in order to attend. It may sometimes be necessary to hold longer courses, but once the organisers go beyond a week it means making allowances for rest periods at week-ends and additional organisation not necessarily contributing to the aim and purpose of the course. The longer course also has implications for the arrangement of suitable cover in the absence of the participant on the course. If one week is considered a norm this will help with the timing and eventually, the placing of the course. There may not be much choice in the matter for, if a residential course is planned, accommodation for a group of at least thirty people - including organisers and course tutors - has to be found somewhere. It means too a choice of dates in vacations, but vacations long enough and without religious or family festivals, for participants to be willing to give up one week of their holiday. Also it is most likely that suitable accommodation will only be available in educational or similar institutions during that time.

Location and Accommodation

Suitable accommodation means not only the sleeping and catering facilities for participants away from home, but also the rooms where teaching and discussion can go on without disturbance. There is a need for at least one lecture room or class-room large enough to accommodate the whole course and possibly a few visitors as well, and smaller rooms for discussion groups to allow everyone to have his say. In addition office space or, better, a small office will be required to allow the necessary administration to be carried out before and during the course, and a place such as a common room where participants can congregate socially during their leisure time. This latter facility is of great importance as much of the work of a course or conference is done in informal discussion and through personal contacts. All these requirements are usually met in colleges which train teachers or in other higher institutions of learning, and if they are under government control they have the added advantage of being available at the right time, at the right cost and with the full co-operation of the college authorities themselves. So the placing of the course should not provide too much difficulty, although it is still necessary to ensure that all the facilities required will in fact be available at the right time.

Financial Aspects

For a course or conference to reach the right people and therefore to have a chance of success, it is important that it should be properly funded. The expenditure for the proposed course can be broken down under a number of heads.

Accommodation and Catering	Accommodation and catering should normally be taken care of by the administrators, particularly if the accommodation is in an institution under government control. Even so it is well to be sure that this has not been overlooked, in order to avoid the difficulties which would have to be faced later if there has been any slip-up.
Participants' Allowances	It is essential to know the financial entitlement of the participants, as this has to go into the course information and invitations when they are circulated. Few are likely to apply to join a course without knowing whether they will be entitled to a refund of their travelling expenses, an important matter where distances are considerable, and to subsistence allowances whilst away from home or station.
Administrative Expenses	There needs to be adequate provision for the administrative expenses of the organiser and for his secretarial assistance.
Fee Payments	Many members of the education service will be giving their services freely, but even where no actual lecture fees are involved there will be expenses for those involved in the academic side of the course, as well as free accommodation and maintenance.
Incidental Expenditure	Finally a sum may be set aside for incidental expenditure and entertaining the visitors and participants. It may be appropriate, for instance, to give a reception to local dignitaries at the official opening of the course, which may be good for public relations, but still has to be paid for.

The main point for you as course organiser is that you should ensure at the outset that all necessary expenditure has been thought of and that the sums set aside are adequate. A budget must be prepared.

The Circulation of Information

You will want to ensure as soon as possible that all those who are likely to benefit from the content of the course and for whom it is intended, hear about it and learn enough about its theme to enable them to come to a well-informed decision to attend. This means that you have to find a way to circulate advance information (and this is where a six months time scale comes in) either to the individuals whom you want to reach, or those who have responsibility over intended participants, like principals of schools and district or regional education

officers. For instance, in the case of a course for school staff it can be the proper procedure to write to the principals of schools and/or heads of department with a request to pass on the information to those concerned. At the same time it is sensible to circulate as many relevant official bodies and individuals as possible in the area where the course is held and from which you are likely to draw the participants so that nobody feels left out. People naturally like to be told about what is going on in what they consider to be their area, and it makes for good relations and may well contribute to the success of the undertaking. Quite apart from this it is obviously desirable that all those who might be interested, hear about the projected course in good time, to enable them and possibly their principals or superior officers to make proper preparation. It is therefore important that this first circular contains as much information as can be made available at that stage and this should include the theme or content, the persons for whom it is intended, the place and time, the official support regarding allowances, and an indication of how further details and application forms may be obtained. It may also be desirable to include the names of those who are likely to lecture but that might not be possible at this early stage as the lecturers and tutors may yet have to be invited, unless they are detailed at the outset by the authorities who have initiated the course in the first place.

Applications

About half-way between the circulation of the first information and the actual date of the course or conference, it will be time to issue the actual invitations and application forms. This intervening time will have given our Planning Committee an opportunity to map out the programme in greater detail and allowed confirmation of those who are going to do the teaching and tutoring. The provisional course programme will be attached to the invitation letter which should also repeat all the information given previously (in greater detail if possible). The form of application must request enough information to allow the organisers to make a proper selection of those most suitable for the course and to reject those who may only wish to come along for the trip. In addition a closing date for applications should be set some 4-6 weeks before the commencement of the course stating that late applications will only be considered in exceptional circumstances. This time limit is necessary not only to process the applications and possibly select participants, but also to inform the successful applicants and send them the joining instructions in good time, writing also to explain the situation to the other applicants. Some think it is a good idea to request a small (returnable) deposit to be included with the applications because this may deter those who apply happily and then decide to stay away at the last moment; this is a matter which is best decided in the light of local circumstances. The method of circulation will presumably be the same as that adopted for the original information

unless there has been another procedure suggested in that first circular, such as requesting those interested to apply for further information and the appropriate forms.

Co-ordination

Sub-Committees In all matters relating to planning and preparation the Planning Committee can be of considerable help to you and in the case of a course of a substantial nature it might even be desirable to set up sub-committees on specific aspects. There could be a sub-committee, for instance, to develop course content and teaching materials. A programme sub-committee might plan the daily activities of the course and the allocation of participants to discussion groups. Another sub-committee might formulate the evaluation procedures. As a good manager you will be aware that, when there is division of labour, appropriate mechanisms for co-ordination should also be provided. This is best achieved in relation to the work of sub-committees by ensuring that each sub-committee chairman is a member of the Planning Committee to which he reports regularly. It may also be helpful for you as course organiser to have the right to attend sub-committee meetings, though you may not necessarily always do so, and to receive as a matter of course the minutes of all such meetings. In this way you will be able to keep tabs on the whole planning process.

The Role of the Course Secretary

Reference has been made to the need for adequate secretarial assistance, which applies during the period of planning and during the course itself. Without such support it would be difficult to circulate course information widely, receive applications and possibly deposits, invite speakers, deal with local conditions and answer many enquiries and other correspondence. It would be wise for you to request from your authorities some secretarial help, which would probably be on a part-time basis at the early stages, as well as some time from your own normal duties, to deal properly with matters relating to the course. It would also be desirable that the secretary concerned should be available full-time as Course Secretary for the duration of the course as he/she will by then be thoroughly familiar with the administrative detail which form part of the smooth running of the exercise.

Instructions to Participants As the beginning of the course approaches, the work of the Course Secretary increases by leaps and bounds. Three to four weeks before the first day of the course (longer where communications are poor) instructions should be issued to participants on the arrangements made for their arrival, on the expected time of arrival (e.g. "not later than..."), where they have to report and how to get to the place, with a map if necessary, and what they are expected to bring with them on the domestic side, like soap, towels, etc. Any preliminary reading material to be studied before the course begins will be included, together with the latest course

information and instructions concerning the problem material related to their own situation which they are expected to bring with them. In order that the participants should obtain the maximum benefit, it is essential that all this material should be distributed in good time, and this will eventually depend on a great deal of systematic hard work in the Course Office.

Registration The Course Office will then need to be ready for the first day of the course and the period of conference registration. At this time, course members will be issued by Reception (i.e., by the Course Secretary and any temporary assistants) with the final Course Timetable, lists of lecturers and tutors, lists of course members and of the allocations to discussion groups and syndicates, name badges, room allocations and information on local and domestic arrangements such as meal times, laundry, postal and transport facilities. It is often found helpful to have all the information sheets for each participant placed beforehand in a large envelope or folder which can simply be handed over to him on registration. This saves a lot of time on the day, and may help to ensure that the opening ceremonial and foundation lecture can begin punctually, with everybody - or nearly everybody - present.

The Course Office Throughout the course, the Course Office will continue to provide a physical base to the tutorial and organising staff and to the participants. It is here that the financial problems of participants will be dealt with and arrangements made for payments to tutors and lecturers. The Office will handle the various papers supporting the teaching and lecturing which have been made ready for the course, as well as the audio visual aids and other illustrative materials. Then there are the daily arrangements such as transport for visits, information concerning social activities, messages for participants, and a ceaseless round of enquiries. It becomes evident that, as organiser, you could not have dealt with all these matters yourself, hence the need for full time support from a Course Secretary.

Information A final point with regard to the Course Secretary's basic job of providing information to participants during the actual course. The task in this respect can be lightened in two ways: firstly by having a well organised system of course notice boards, which are kept up to date, and encouraging course members to read them; and secondly by oral announcements at the end of the first session each morning.

The Commencement and Conclusion of the Course

Official Opening The course will probably be scheduled to begin with an official opening at which an appropriate public representative or high official will welcome the participants. The organiser, if the course is newsworthy, must remember to inform the press, and should meet any journalists to try to ensure that their reports are factually correct. The opening will usually be followed by a foundation lecture or keynote

address, which will set the theme of the course and should therefore be given by somebody of standing in the field under discussion. He might be a Chief Inspector with a particular concern in this area, or a senior Minister or Department official with responsibility for related policy matters, or an academic who can make a scholarly contribution which has practical application. It is as well to have one or two names in reserve in case the distinguished opening lecturer has to withdraw at the last minute.

Out of Course
Programmes

The next chapter considers the substantive content and teaching methods of the course, but before referring to the concluding session, it may be appropriate to note, in passing, that you should not overlook the need for variety in out of class activities during evenings or any free time that may occur. There are many possibilities. There can be discussions of general issues or brains trusts, cultural performances (possibly by school pupils), film shows and sports activities. Some time should be left for recreation and shopping, and it may be wise to set one afternoon and possibly one evening aside for this in a week's programme, while offering those who wish to see the local sights an opportunity to join a coach trip. Appropriate opportunities for relaxation act as a complement to the hard work expected in the formal sessions, and will contribute to the success of the course. The final session, which also needs to be carefully planned, will arrive all too soon.

Final
Proceedings

Experienced course organisers will be well aware of the importance of programming the final proceedings in such a way that few course participants will succumb to the temptation to drift away to catch convenient travel connections. It can be useful towards the end of the course to have a plenary session with reports from various working groups which have been set up. It can also be disastrous and will lead to a sense of anti-climax if the reports are lengthy, unimaginatively delivered and repetitive. Much depends on having a good chairman, who should meet the group spokesman beforehand to explain what is required and to try to avoid tedious overlaps. He/she will need to handle the session itself in a firm but friendly manner, which will avoid time wasting on less important matters as some members of the audience begin to look at their watches.

A general overview and summing up will now be appropriate, which may be provided by the chairman of the previous session or, if possible, by the key speaker originally responsible for setting the theme in the foundation lecture. If effectively done this final overview can serve to bring together the different parts of the course to form a meaningful whole for the participants, who will return to their home surroundings determined to put into practice what they have learnt on the course.

A very brief concluding session will provide an opportunity for thanks to be expressed to all who have contributed to the success of the course. An alternative is for such courtesies and expressions of appreciation to have taken place at a course party the previous evening, an occasion which can be

recommended as an excellent means of strengthening the informal links which will be invaluable in enabling the message of the course to be taken further. Similarly it will have been a good idea to have a course photograph at an appropriate occasion as a further means of emphasising the significance of course attendance.

Post Course Administration A number of tasks remain for the course organiser after the participants have departed for their homes. You will need to write to thank all who have contributed to the programme, and ensure that all accounts are met and all bills paid. A final meeting of the Planning Committee may need to be called for report and review.

Course Report

Course evaluation will be considered at the end of the next chapter after the discussion of course content and teaching methods. This chapter ends by raising the question of whether it may be desirable to publish an account of the course for general distribution. Such a report, if it is to be produced will need to be carefully planned and organised.

The main argument in favour of producing a publication as a result of the course is that in this way the considerable work by many people which has gone into the enterprise can be of lasting benefit. It will provide helpful reinforcement of learning for those who have attended the course, but it will also reach and influence those who had an interest in its objectives but could not be present.

If it is decided to have a course report, the main speakers can be asked to prepare their addresses as papers for publication, or at the very least to provide summaries which can be included in the report. Secondly, if much of the work of the course is done in small groups or syndicates, you should arrange for a record of those discussions and practical sessions to be available to be included or summarized in the report as a contribution by the participants. Some account should also be given of other activities or any institutional visits related to the course. The final speaker who provided the course overview may be glad of the opportunity to revise his address for publication.

The compilation and editing of the report is a technical and skilled achievement which involves considerable effort. As course organiser you may wish to be personally involved, believing that you have the best overall view of the whole course. On the other hand your other responsibilities may be too demanding for it to be sensible for you to take on the major responsibility, in which case it will be very valuable if you have someone on the Planning Committee who has the appropriate skill and interest and who is prepared to take on the editorship either alone or in collaboration with you.

Timing For maximum impact it is desirable that the report should appear as soon after the end of the course as possible. In so far as financial considerations permit, a generous estimate should be made of the number of copies required, so

that the report will be easily available to those who will benefit by it. Copies should be placed in appropriate offices and libraries and sent for review to any relevant educational journal, even those at some distance from your centre of activity. If the report receives favourable comment you may continue to receive requests for it for many years. In this way your course will still be influential when you have almost forgotten the hard work that went into its planning and organisation.