Learning and Development GUIDEBOOK

DSWD
Department of Social Welfare and Development

Learning and Development Guidebook

Table of Contents

Glossary of Terms

70-20-10 Learning Model	A learning framework which suggests that a blend of appropriate and varied L&D approaches can provide powerful learning, with the odds that learning will be about 70% from informal, workplace experiences, and challenging assignments; about 20% from feedback, coaching, mentoring, and interaction with others; and about 10% from formal learning interventions, including training programs, structured courses, and self-study.
ADDIE Model	Instructional Systems Development model that provides a systems approach to Analyzing, Designing, Developing, Implementing, and Evaluating (ADDIE) L&D interventions
Affective Domain	Learning domain that deals with emotional response to things, people, and events; includes feelings, values, appreciation, enthusiasms, motivations, and attitudes
Analysis	Identifying gaps in competencies of groups and individuals that affect their job performance, and prioritizing learning needs that can be addressed by LDIs
Andragogy	Art and science of adult learning
Application Objective	Also referred to as critical behaviors, describes how learners are expected to apply their learning to their job
Asynchronous Learning	Time-independent environment where learning can take place at any time; supports learning relationship among learners and with learning facilitators without need for people to be online at the same time
Blended Learning	The practice of using several media in one program. It refers to the combination of formal and informal learning events, such as classroom instruction, online resources, and on-the-job coaching.
Capability Building	Refers to the provision of institutional assistance to DSWD's intermediaries such as local government units, non-government organizations, people's organizations, and other social welfare and development agencies, as well as its internal staff the purpose of which is geared at enhancing their competencies through the transfer of technical and organizational skills and know-how so as to enhance human and institutional capabilities.
Capacity Development	Process whereby people, organizations and society as a whole unleash, strengthen, create, adapt, and maintain capacity over time.

Cognitive Domain	Learning domain that relates to knowledge and mental skills, including recall or recognition of specific facts, procedural patterns, and concepts
Competency-based Approach	Assesses the actual level of proficiency again the required competency levels
Critical Behaviors	The few specific actions which, if performed consistently, will have the biggest impact on results
Deductive Methodology	Promotes discovery or inquiry learning; allows learners to acquire learning by moving through the experiential learning stages
Design	Conceptualizing the L&D intervention that will address the learning needs; i.e., formulating learning objectives and crafting a detailed L&D Implementation Plan
Desired Outcomes	Broad and long-term organizational results at a high level and which reflect the reason why the organization exists
Development	Fleshing out the content and methodologies of the L&D intervention, and producing delivery and learning materials to support implementation and facilitate the learning process
Enabling Learning Objectives	Disaggregates terminal objective into manageable learning blocks; provides milestones in achieving terminal objective
Engagement	Degree to which learners are actively involved in and contributing to the learning experience
Evaluation	Determining whether objectives of the L&D intervention have been achieved and how the intervention has contributed to improved individual and organizational performance
Experiential Learning Cycle	Four-stage experiential theory which espouses that Learning is the process whereby knowledge is created through the transformation of experience
Face-to-face Learning	An instructional method where course content and learning material are taught in person to a group of learners
Formal Learning	Refers to planned learning programs composed of activities within a structured learning setting, and includes instructor-led classroom, instructor-led online training, certification programs, workshops, and college courses. There is a curriculum and agenda, and objectives that are pursued within a pre-established timeframe.
Formative Assessment	Validates and ensures objectives are being met while LDI is ongoing

Implementation	Executing the L&D intervention based on the design using the delivery and learning materials, with the achievement of learning objectives as key concern
Inductive Methodology	Provides learners direct instruction on accepted principles and generalizations then allows them to draw possible applications
Job-based Learning	Also referred to as job-embedded learning, activities are integrated into learners' work practices; thus, learning happens right in the workplace.
Knowledge Sharing Sessions	Covers all types of activities held within the agency where knowledge sharing takes place. These events include conferences, fora, seminars, or brown bag sessions.
LDI Design and Implementation Plan	Captures detailed LDI elements (i.e., learning objectives, content, methodologies, resources, and timeframe); serves as a blueprint for developing learning resources, and implementing and evaluating the L&D intervention.
Learner Satisfaction	Degree to which learners feel positively about the training intervention and its elements
Learning and Development	Process of acquiring and developing knowledge, skills, capabilities, behaviors, and attitudes through experiences, events, and programs provided by the organization, guidance and coaching provided by line managers and others, and self-directed or self-managed learning activities. It ensures that the organization has the knowledgeable, skilled, and engaged workforce it needs
Learning Management	Delivering content and methodologies according to adult learning principles and conditions, and monitoring, facilitating, and supporting learners' achievement of learning objectives
Level 1: Reaction	Level of evaluation that measures the degree to which learners find training favorable, engaging, and relevant to their jobs
Level 2: Learning	Level of evaluation that measures the degree to which learners acquire the intended knowledge, skills, attitude, confidence, and commitment based on their participation in the training
Level 3: Behavior	Level of evaluation that measures the degree to which learners apply what they learned during training when they are back on the job
Level 4: Results	Level of evaluation that measures the degree to which targeted outcomes occur as a result of the training and the support and accountability package

Monitoring and Evaluation	Two distinct but complementary processes: monitoring is the continuous tracking of actual accomplishments against what was planned or expected; and evaluation is the time-bound processes of assessing achievement of objectives, and what facilitated or hindered success
Online Learning	Learning delivery mode where majority of the coursework is done through the internet (through forums, shared documents, email, chat, etc.), with possible face-to-face interaction between learners and the learning facilitator and doing coursework in a classroom or at a distance, so long as communication is primarily online.
Problem-centered Structure	Arranges materials around problems learners encounter on the job; suitable when learners need to learn how to solve problems
Problem-solving Approach	Also referred to as performance gap-based approach, is used when identifying learning needs related to performance issues
Program Management	The overall implementation of the LDI to ensure that all activities are carried out as planned according to standards
Psychomotor Domain	Learning domain that is concerned with physical movement, coordination, and use of motor skills; measured in speed, precision, distance, or techniques in execution
Relationship and Discussion-based Learning	Also referred to as social or exposure learning, it provides venues for learners to interact with their supervisors, peers, or colleagues in the profession or industry
Relevance	Degree to which learners will have the opportunity to use or apply what they learned on the job
Required Drivers	Processes and systems to reinforce, monitor, encourage, and reward performance of critical behaviors
Resource and Welfare Support Management	Planning, mobilizing, and coordinating resources for LDI implementation to ensure that these are readily available and used in the most efficient and effective manner to support program implementation, and are responsive to welfare needs of learners, LSPs, and LMT
Sans Serif Fonts	Fonts without serif (decorative stroke that finishes at the end of a letter stem); with clean and precise ends
Serif Fonts	Fonts with a decorative stroke that finishes at the end of a letter stem (serif)
Session Learning Objective	Further breaks down enabling objective into smaller learning bites;

	describes what learners will be able to do right after a learning session
Summative Assessment	Determines whether program is able to deliver the results it is designed to accomplish
Synchronous Learning	Takes place in real time in an environment where learners and learning facilitators are present at the same time; supports learners in the development of more social learning communities by being present together in a virtual environment
Task-centered Structure	Arranges materials by their relationship to job tasks; appropriate when there is a specific order in which tasks must be done
Team Management	Partnering and collaborating with Program Management Team, and learning service providers (both internal and external) to ensure that roles are defined and carried out according to standards
Technical Assistance	Process of providing targeted support to an organization or group with a development need or problem. Activities through which DSWD imparts technical and organizational skills and knowhow to a local government unit, another agency or organization, groups or individuals especially where the latter seek for such, with the ultimate aim of standardizing and upgrading delivery of basic services.
Terminal Learning Objectives	Defines overall learning objective of LDI; describes what learners will be able to do by the end of the L&D intervention under what conditions and according to what standards
Topic-centered Structure	Arranges related topics in blocks; helpful when learners need to learn a lot of information

Acronyms and Abbreviations

4As	Activity-Analysis-Abstraction-Application
6D	Six Disciplines of Breakthrough Learning
ABCD	Audience - Behavior - Condition - Degree
ADDIE	Analysis-Design-Development-Implementation-Evaluation
ATD	Association for Talent Development
CBS	Capability Building Section
CO	Central Office
CPD	Continuing Professional Development
CSC	Civil Service Commission
DSPMS	DSWD Strategic Performance Management System
DSWD	Department of Social Welfare and Development
ELC	Experiential Learning Cycle
FO	Field Office
FO-CDS	Field Office Capability Development Section
HRMDS	Human Resource Management and Development Service
ICT	Information and Communication Technology
IDCB	Institutional Development and Capability Building
IDP	Individual Development Plan
ISD	Instructional Systems Development
IT	Information Technology
KMS	Knowledge Management System
L&D	Learning and Development
LAP	Learning Application Plan
LDD	Learning and Development Division
LDI	Learning and Development Intervention
LDI-DIP	Learning and Development Intervention Design and Implementation Plan
LGU	Local Government Unit
LMS	Learning Management System
LMT	Learning Management Team
LNA	Learning Needs Analysis
LSP	Learning Service Provider

M&E	Monitoring and Evaluation
MoL	Management of Learning
OBS	Offices, Bureaus, Services
PMS	Procurement Management Service
PRC	Philippine Regulation Commission
PRIME-HRM	Program to Institutionalize Meritocracy and Excellence in Human Resource Management
SB	Standards Bureau
SDCCA	Service Delivery Capacity and Competency Assessment
SLE	Structured Learning Exercise
SP	Social Protection
SP-CBA	Social Protection Capability Building Agenda
SPMS	Strategic Performance Management System
SWD	Social welfare development
SWD L-Net	Social Welfare and Development Learning Network
SWIDB	Social Welfare Institutional Development Bureau
TA	Technical Assistance

I. Background and Rationale

The Department of Social Welfare and Development remains committed to its mandate to "monitor and provide technical assistance to social welfare and development (SWD) service providers and duty-bearers nationwide."[1]

The Social Welfare Institutional Development Bureau (SWIDB) plays a key role in this mandate, particularly in delivering learning and development interventions (LDIs) to intermediaries and stakeholders to build their capability to implement SWD programs and services.

The COVID-19 pandemic has challenged the way the SWIDB provides LDIs to its clients. Health safety protocols have significantly limited face-to-face learning. SWIDB and its counterparts in Field Offices (FO) and the Central Office (CO) have had to improvise and shift quickly to implement LDIs using online delivery mode. Their initiative, resourcefulness, and determination have enabled them to continue providing LDIs amidst the pandemic. However, this shift to an online mode has also resulted in variations in learning and development practices across offices.

The need to further strengthen SWIDB's learning and development system is made more urgent because of its critical role in achieving the goals of the DSWD SULONG Recovery Plan 2021-2022. It is the program owner of "Strategic Priority 2: Increase capacity of LGUs to improve the delivery of social protection and social welfare services in response to pandemic and preparation for full implementation of Mandanas" of which one of the specific objectives is to "provide technical assistance to LGUs to improve their capacity to deliver social protection and social welfare services."[2]

Notwithstanding the challenges, the pandemic has also opened possibilities and underscored the need for flexible learning delivery modes. In fact, the development and use of digital platforms in the provision of technical assistance is one of the DSWD thrusts for 2021.[3] In addition, more and more technologies that aid learning, communication, and connectivity are emerging and becoming available. They help reach a wider audience of learners in dispersed geographical locations and different work arrangements. They can also cater to the changing profile of learners who are younger and more tech-savvy.

---

1 Note to SWIDB: This mandate statement was lifted from a graphic on Claire's email. May we have info on the source document?
2 Department of Social Welfare and Development (2020). Administrative Order No. 17, Series of 2020 – Adoption of DSWD SULONG Recovery Plan 2021-2022.
3 Department of Social Welfare and Development (2020). Administrative Order No. 20, Series of 2020 – FY 2021 DSWD Thrusts and Priorities.

II. About the Guidebook

A. Purpose

This guidebook aims to provide principles and guidelines, standards, processes, and tools to promote the consistent practice of execution of the L&D Management Cycle (i.e., analysis, design, development, implementation, and evaluation) in providing LDIs for intermediaries and stakeholders. It will cover different types of LDIs as well as face-to-face, online, and blended delivery modes.

It is also intended to guide users in the preparation of documents that meet the requirements and standards of the Professional Regulation Commission's Continuing Professional Development (PRC-CPD) Program.

B. Users

The primary users of this guidebook are LDI implementers who provide L&D interventions to intermediaries and stakeholders:

- Social Welfare and Development Bureau
- Field Office-Capability Building Section (FO-CBS)
- Central Office-Offices, Bureaus, Services (CO-OBS)

The guidebook is also a useful resource for LDI implementers who provide L&D interventions for internal staff:

- Human Resource Management and Development Service (HRMDS)
- Field Office-Learning and Development Section (FO-LDS)

DSWD partners and external stakeholders can likewise refer to the guidebook as they carry out L&D related activities for their own clients.

Further, the Social Welfare and Development Learning Institute (SWDLI) Program Management Team may use the guidebook as resource in operationalizing its goal "to provide continuing professional development programs on SWD to DSWD employees, partners, intermediaries, and other stakeholders."[4]

C. How to Use the Guidebook

This guidebook is organized in sections along the phases of the ADDIE (Analysis-Design-Development-Implementation-Evaluation) Instructional Systems Development model.

---

[4] Department of Social Welfare and Development (2020). Administrative Order No. 14, Series of 2020: Establishment and Administration of the Social Welfare and Development Institute (SWDLI).

The sections are designed to stand alone. More experienced LDI implementers or those who have been given a specific role in an ADDIE phase where they are less conversant with may opt to simply zero in on the particular ADDIE phase they would like to learn more about.

For those who are new to or not so familiar with the ADDIE, it will be helpful to follow the sections sequentially to gain a comprehensive understanding of how each phase is carried out, and how one phase links to the next.

L&D PERSPECTIVES

This section of the L&D Guidebook will cover:

- Definitions of L&D and related terms
- L&D frameworks and principles
    - ADDIE Instructional System Development Model
    - Six Disciplines of Breakthrough Learning
    - 70-20-10 L&D Model
    - PRIME HRM
    - Adult Learning Principles and Frameworks

III. L&D Perspectives

A. Some Definitions

Learning and Development is the process of acquiring and developing knowledge, skills, and attitudes through experiences, events, and programs provided by the organization, guidance and coaching provided by line managers and others, and self-directed or self-managed learning activities. It ensures that the organization has the knowledgeable, skilled, and engaged workforce it needs.[5] This definition underscores that the focus of L&D is building competencies of people in the organization.

Providing L&D interventions is a component of **capability building**, which in the context of DSWD, refers to "the provision of institutional assistance to DSWD's intermediaries such as local government units, non-government organizations, people's organizations, and other social welfare and development agencies, as well as its internal staff. The purpose of which is geared at enhancing their competencies through the transfer of technical and organizational skills and know-how so as to enhance human and institutional capabilities."[6]

Capability building is considered as one of DSWD's approaches for providing **technical assistance**, which consists of "non-monetary interventions that are designed to enhance the capability of LSWDOs based on needs assessment, for the effective implementation of SWD programs, projects, and service."[7] Direct technical assistance comes in the form of providing L&D interventions or consulting services, where TA provider personally applies expertise to client's problem or area of need. Technical assistance may also be indirect, where TA provider guides client organizations to resources like media or tools, web-based resource, a staff member of another organization, networks, etc. This can be done onsite (i.e., at the location of the organization), or offsite (i.e., virtually via telephone, email, or video-conferencing, etc.).[8]

Technical assistance is among DSWD's strategies (aside from policy formulation, standards setting, and direct service delivery) in contributing to the institutional development of its intermediaries and stakeholders. DSWD defines **institutional**

---

5 Armstrong, M. (2010). Essentials of HRM Practice, as cited in Civil Service Commission's Human Resource Development (L&D) Planning Guidebook.

6 DSWD Administrative Order No. 16, Series of 2010. Framework and Guidelines for Capability Building of DSWD Social Protection Intermediaries and Stakeholders.

7 DSWD Memorandum Circular No. 10, Series of 2018. Guidelines on the Provision of Technical Assistance and Resource Augmentation to Local Government Units Through Local Social Welfare Development Offices

8 Adapted from: Definitions and Core Principles of Technical Assistance. http://elearning.daremightythings.com/CCF/deliveringta/default.aspx?chp=1

development as "the distinct interconnected practice and process by which a diversity of individuals, organizations, and social systems continually increase their capacities and improve their performance in achieving shared social aspirations."[9]

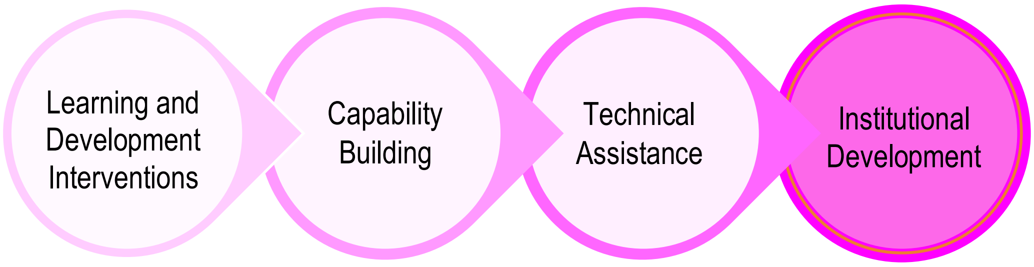


Figure 1. Providing LDIs as a component of CB and TA

B. L&D Frameworks and Principles

More and more, organizations recognize that the management of L&D is a strategic function that should be anchored on and support their desired outcomes and thrusts. They are also mindful of the processes involved in analyzing learning needs, and designing, developing, implementing, and evaluating of L&D interventions that will equip leaders and staff with essential competencies needed to achieve organizational goals. This stance sets the stage for reducing "scrap learning" and ensuring optimum value and impact from L&D investments.

"Scrap learning" refers to the amount of content delivered during an L&D intervention that learners do not retain or apply on the job. This suggests that L&D participants are not actually learning or applying required knowledge or skills at work, thus resulting in lost productivity and wasted investments.

Adapted from: https://trainingindustry.com/glossary/scrap-learning/

Following are accepted frameworks or models, principles, and best practices in managing the L&D function. These will also be referred to in various sections of the guidebook.

➲ ADDIE Model

The ADDIE Model, which stands for Analysis-Design-Development-Implementation-Evaluation is widely used by organizations in managing the L&D process. It is an Instructional Systems Development (ISD) model that provides a systems approach to analyzing, designing, developing, implementing, and evaluating L&D interventions.

[9] DSWD Administrative Order No. 16, Series of 2010. Framework and Guidelines for Capability Building of DSWD Social Protection Intermediaries and Stakeholders.

In a snapshot, the ADDIE model captures the key phases of the L&D Management Cycle:

An *analysis* of performance gaps and related learning needs is conducted to ascertain the need for, and the focus areas of L&D interventions. The results of analysis become the basis for the identification and *design* of appropriate interventions, *development* of learning resource materials, and *implementation* or delivery of interventions. *Figure 2* shows the *evaluation* phase at the center of the cycle, rather than at the end. This is to highlight that some form of evaluation takes place at all phases to ensure that processes are carried out and expected outputs and results are delivered.

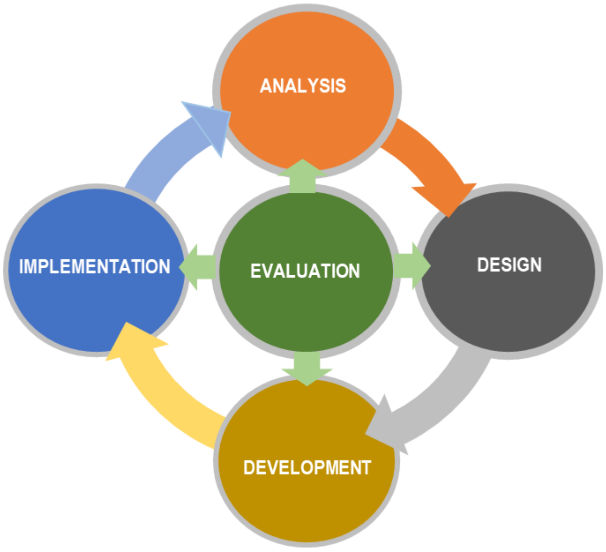


Figure 2. ADDIE Model

Following is a brief description of the L&D Management Cycle phases:

Analysis	Identifying gaps in competencies of groups and individuals that affect their job performance, and prioritizing learning needs that can
Design	Conceptualizing the LDI that will address the learning needs; i.e., formulating learning objectives and crafting a detailed L&D activity
Development	Fleshing out the content and methodologies of the LDI, and producing delivery and learning materials to support
Implementation	Executing the LDI based on the design using the delivery and learning materials, with the achievement of learning objectives as
Evaluation	Determining whether objectives of LDI have been achieved and how the intervention has contributed to improved individual and

Figure 3. Phases of the ADDIE Model

The ADDIE Model will be used as the main framework in discussing the various phases of the L&D Management Cycle in this guidebook.

➲ Six Disciplines of Breakthrough Learning

One framework that highlights a holistic view of L&D is the Six Disciplines of Breakthrough Learning or 6D.[10] It advocates paying attention to six areas when planning and providing L&D interventions. The Six Disciplines strengthen the execution of the ADDIE phases to ensure that an L&D intervention is not regarded as a discrete event.

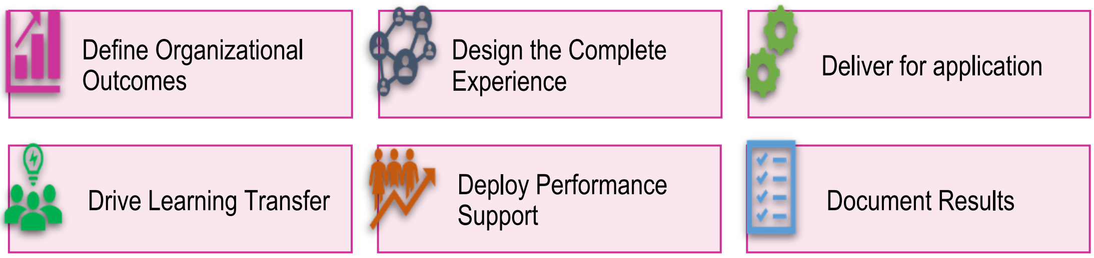


Figure 4. Six Disciplines of Breakthrough Learning

1. Define Organizational Outcomes

   The key premise of the First Discipline is that developing people to perform better is an essential competitive strategy for achieving organizational mission. Thus, L&D is pursued in support of organizational goals.

   - It is about defining the end in mind, i.e., what the organization expects to happen as a result of the L&D intervention. These can be in the form of improved productivity, enhanced client satisfaction, better product quality, more efficient and responsive services, lower cost, etc.
   - It recognizes that clearly defined and well-understood outcomes will inform L&D investment and guide the selection, planning, design, and execution of value-adding L&D interventions.
   - It is a key input to planning and implementing a robust and sound evaluation of L&D investment.

Though they are connected, expected outcomes are not the same as learning objectives.

- Organizational outcomes are what happen as a result of learning transfer and application to the workplace.
- Learning objectives are the reference for designing interventions and defines what people will be able to learn and do by the end of the interventions.

[10] Pollock, R. et.al. The Six Disciplines of Breakthrough Learning. https://the6ds.com/wp-content/uploads/2017/03/Introduction-to-the-6Ds-3.0.pdf. Accessed 16 August 2021.

2. Design the Complete Experience

The Second Discipline emphasizes that L&D is a holistic process, not an isolated event where invited participants just show up to attend. It is concerned with designing the complete learning experience.

- It highlights the importance of planning and designing a total learning experience that accounts for what will transpire during actual learning sessions and considers pre- and post- L&D intervention environments that can affect the learning outcome.
- It enjoins L&D implementers to view learning needs with an expansive lens by looking at factors in the workplace that affect performance and identifying what preparations and mechanisms may be necessary to strengthen the climate for learning readiness and transfer.
- It strengthens the case for including performance factors other than competencies in the learning needs analysis process.

Managing what happens before and after the conduct of the L&D intervention is considered as important as designing and implementing the intervention itself. This means being more explicit in terms of determining and planning needed steps to transform learning to outcomes.

3. Deliver for Application

The Third Discipline helps address the challenge of bridging the gap between learning and doing.

- Delivering for application hinges on how well the expected outcomes and learning needs have been defined in the First Discipline.
- It requires a clearly defined set of objectives and sound grounding on adult learning principles as it involves careful selection and provision of instructional methods, technologies, learning resources, and other support mechanisms to facilitate acquisition and transfer of learning back to the workplace.
- It also entails being aware of and attending to factors that will reinforce or block learning application (including level of confidence and commitment of learners).

Maintaining focus on the learning process and building readiness for learning application requires mindful execution of the design, development, and implementation phases of the L&D Management Cycle.

4. Drive Learning Transfer

The Fourth Discipline underscores the fact that "Learning creates value only to the extent that it is transferred and applied to work."

- It acknowledges that the extent to which learning is transferred is determined by the "transfer climate," i.e., the varied factors in the workplace that communicate to employees whether transfer is expected and supported.
- This discipline is concerned about planning and installing systems and processes to stimulate and support learning transfer back to the workplace.
- It involves collaboration between L&D implementers and supervisors/ managers especially since the latter are the ones who can facilitate learning transfer once the learners are back on the job.

Efforts to drive learning transfer need to be purposive. Organizations cannot rely on individual initiatives or leave things to chance, in the hope that workplace application will happen.

5. Deploy Performance Support

The Fifth Discipline recognizes that people can find trying new behaviors in the workplace as risky, especially when performance support mechanisms are not available.

- It is concerned with planning for and deploying mechanisms such as coaching, learning groups, job aids, help lines, etc., during and after the conduct of L&D interventions so people feel more confident to apply learning and demonstrate new behaviors.
- This can also mean providing performance support to managers/ supervisors in the form of learning resources or sessions, so they are more equipped to facilitate transfer of learning.
- One of the desired effects of this discipline is to help people experience early wins or successes, no matter how small, in their attempts at application. This will motivate them to continue with new behaviors.

The presence or absence of performance support in the workplace can affect learners' predisposition to try new ways of doing things (by applying what they learned) or stay in their comfort zone (by clinging to old habits).

6. Document Results

The Sixth Discipline helps an organization to determine whether L&D investments provided value by contributing to its goals and performance.

- It focuses on documenting and finding answers to two questions in a way that will inform decisions related to continuous improvement and making future L&D investments:
    - Did the L&D intervention achieve the results for which it was designed?
    - Was it worth it?
- This discipline entails installing a robust documentation and evaluation process that includes not only the metrics needed to manage the L&D process (e.g., conduct of activity, learners' reactions, knowledge acquired, etc.), but more importantly, to determine whether the L&D intervention contributed to improved performance.
- It involves producing documented results that are "relevant, credible, compelling, and efficient."

Documenting results is key to promoting a cycle of continuous learning, innovation, adaptation, and improvement, which should be modeled by L&D implementers in the organization.

The Six Disciplines will be embedded in the discussion of the different ADDIE phases. Table 1 shows which ADDIE phases are supported by the different disciplines.

	A	D	D	I	E
D1	☑				
D2	☑	☑	☑	☑	
D3		☑	☑	☑	
D4	☑	☑	☑	☑	☑
D5	☑	☑	☑	☑	

Table 1. 6D and ADDIE Alignment

➲ 70-20-10 L&D Model

The 70-20-10 model[11] posits that a blend of appropriate and varied L&D approaches can provide powerful learning, with the odds that learning will be about 70% from informal, workplace experiences, and challenging assignments; about 20% from feedback, coaching, mentoring, and interaction with others; and about 10% from formal learning interventions, including training programs, structured courses, and self-study.

[11] Scott, S. and Ferguson, O. (2016). *New Perspectives on 70:20:10.* https://www.goodpractice.com/ld-resources/new-perspectives-on-70-20-10-2nd-edition. Accessed 31 March 2018.

Since it was first published in 1996 by M. Lombardo and R. Eichinger, the model has widely gained both positive and critical attention from organizations and L&D professionals. The growing consensus is that it supports early researches that adult learning is mostly self-directed and that much of the learning that takes place in organizations is informal. However, the numbers presented in the model need not be taken as fixed ratios or as a strict prescription.

The 70-20-10 model provides organizations a set of macro and micro lens for reviewing and enhancing their range of L&D interventions (which is traditionally skewed to formal learning), so they are more strategic and supportive of learning and organizational performance.

At the macro level, the model can be applied in reviewing where the organization's L&D investments are focused on and checking whether the balance of L&D interventions is appropriate

A 70-20-10 approach advocates that more resources (money, time, etc.) are directed towards 70-20 types of LDI

Assessing L&D's Bigger Picture

At the micro level, applying the 70-20-10 perspective will help LDI designers to consider whether the balance of activities is appropriate to meet learning needs and performance objectives

A 70-20-10 approach would consider embedding mechanisms or activities for informal learning in the design (i.e., when learners go back to the workplace)

Planning and Designing Specific LDI

Figure 5. Using 70-20-10 at Macro and Micro Levels

70	20	10
Problem-solving	Peer coaching	Courses and workshops
Challenging tasks	Action learning	E-learning modules
Stretch assignments	Mentoring	Seminars
Special projects	Communities of practice	Virtual classrooms

Figure 6. Sample 70-20-10 Menu of Activities

It would help organizations and L&D implementers to answer five questions before adopting the 70-20-10 model for them and their client organizations:

1	*How are people currently learning?*
	▪ An audit of current L&D practices (no matter how simple) can help map out the array of activities that people are engaging in to acquire competencies needed by their jobs. Gather data on which of these are valuable and which are not working. The audit can possibly surface successful practices of informal and social learning that can benefit from organizational support. ▪ This groundwork can help L&D implementers build the case for the 70-20-10 learning model.

2	*Are the organization's executives and senior managers likely to support the use of the model?*
	▪ Top management sponsorship is critical to making the 70-20-10 model work. Presenting the data gathered from the L&D audit can help build the case and generate buy-in for transitioning to 70-20-10. ▪ Although reduced L&D cost may be an attractive carrot for management to support the model, the more strategic aim of improving organizational performance should be highlighted in any effort to communicate its value to senior stakeholders.

3	*Do L&D implementers have the competence to promote all aspects of the 70-20-10 model?*
	▪ The use of the 70-20-10 model can be threatening to some L&D implementers whose expertise and comfort level are in managing training and other formal learning activities. ▪ L&D teams will need to take stock of competencies needed for the model to work and assess their current proficiency level in these areas. This will mean learning how to design, develop, implement, and evaluate non-training interventions.
4	*Is 70-20-10 the right mix for your organization and your clients?*
	▪ While the 70-20-10 numbers is not set in stone, it provides a reference for looking at the three areas of the framework (i.e., on-the-job experiential learning, learning from others, and formal learning) and mapping out how L&D is currently supporting each one. ▪ Some situations and context (e.g., a group of learners who are new in their jobs and have low expertise) may require more formal than informal learning activities at the start. L&D implementers have to be clear how the model can help address each performance and learning need, and work for the total intervention that is being conceptualized.
5	*How can learners' managers/supervisors best support learning?*
	▪ The 70-20 component of the model mostly happens in the workplace. L&D implementers will have to involve managers/supervisors in planning L&D interventions that would require their support. ▪ Preparing managers/supervisors to support learning will entail clarifying expectations from them, advocating a developmental mindset, and equipping them with skills and tools to facilitate learning in the workplace.

➲ **PRIME-HRM**

The Civil Service Commission's Program to Institutionalize Meritocracy and Excellence in Human Resource Management (PRIME-HRM) aims to elevate public sector human resource management to a level of excellence through the assessment, assistance, and awarding processes of HRM Systems, Practices, and Competencies using HRM maturity level indicators that are at par with global HRM standards.

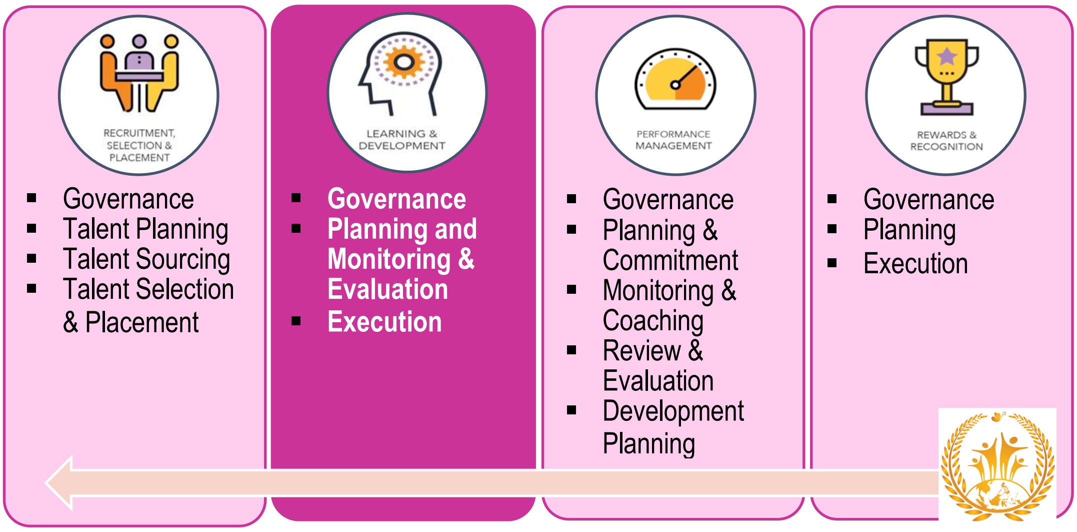


Figure 7. PRIME-HRM Core HR Systems and Pillars

PRIME-HRM covers four core HR systems, each with a set of pillars: Recruitment, Selection and Placement, Learning and Development, Performance Management, and Rewards and Recognition. Based on their alignment with set indicators, a system may be categorized as:

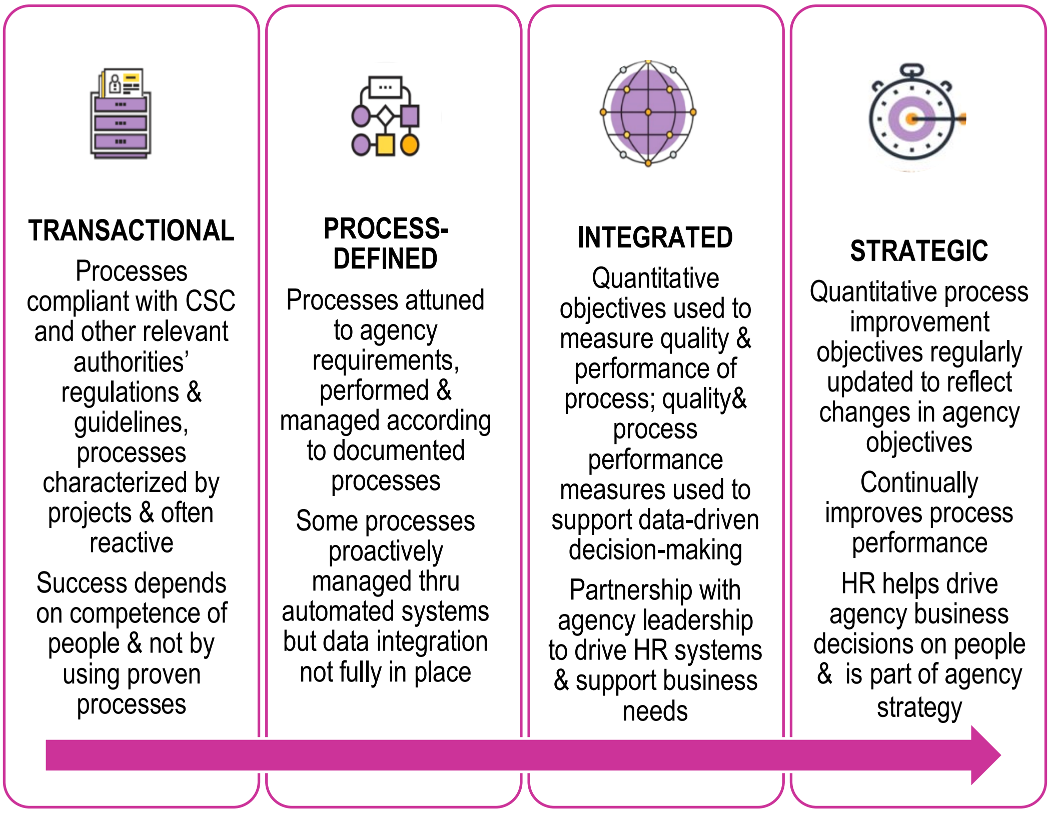


Figure 8. PRIME-HRM HR System Maturity Levels[12]

[12] For the different maturity level indicators, please refer to: Civil Service Commission. (2016) PRIME-HRM Primer. https://archive.australiaawardsphilippines.org/resource-center/publication/csc-prime-hrm-primer

PRIME-HRM defines three pillars of the L&D system: Governance, Planning and Monitoring and Evaluation (M&E), and Execution.

Governance

Overall structure and processes for setting policies, establishing L&D system and budget, and overseeing management and effectiveness of L&D function and its alignment to the agency's vision and strategic direction

Defines responsibility centers and roles of key players, and identifies L&D support mechanisms

Planning and M&E

Hierarchy of planning processes that drive the L&D function in the agency

Establishes link between L&D programs and activities and the agency's goals and directions

Includes monitoring and evaluation framework for determining value and effectiveness of L&D investments

Execution

Processes to operationalize the elements of the L&D cycle (from learning needs analysis to delivery)

Defines guidelines and processes that facilitate integrated management of L&D programs and activities

Figure 9. L&D System Pillars

The PRIME-HRM is primarily developed to help transform internal HR systems of agencies to support achievement of their mandate. The maturity indicators are nonetheless useful as benchmark in ensuring that SWIDB's L&D system is at par with global standards. L&D Management Cycle processes (under the ADDIE phases) covered in this guidebook are intended to support progression to Strategic maturity level.

➲ Adult Learning Principles and Frameworks

It was Malcolm Knowles who first used the term "Andragogy" to refer to the art and science of adult learning. As emphasized in the *Six Disciplines of Breakthrough Learning,* a sound grounding on adult learning is necessary for L&D implementers to be able to "design the complete experience" and "deliver for application."

Assumptions Underlying Andragogy[13]

Knowles presented a set of key assumptions about adult learners that differentiate them from child learners.

1. Self-Concept

   As adults mature, their self-concept moves from one of being dependent toward one of being self-directed. They typically prefer to be involved in choosing what they need to learn, when they want to learn, and how they want to learn.

2. Adult Learner Experience

   Adults build up a growing repository of experiences that is a valuable resource for learning. These experiences can be harnessed during learning sessions to deepen discussions and promote knowledge sharing among learners.

3. Readiness to Learn

   Adults' readiness to learn is influenced by what they need to know to handle life situations and work challenges. Adult learners are also more inclined to learn things they need to perform demands of their social roles.

4. Orientation to Learning

   Adult learners' time perspective changes from one of postponed to immediate application of knowledge. Thus, they are more likely to seek learning opportunities which are problem-centered rather than subject-centered.

5. Motivation to Learn

   While there are external factors that can motivate adults to learn, the more potent motivators are internal (e.g., self-esteem, better quality of life, self-actualization, etc.).

6. Purpose of Learning

   Adults have a need to know "what's in it" for them; i.e., how the new knowledge can be immediately applied or how it will help them solve a problem.

[13] Caruso, S. "Malcolm Knowles and the Six Assumptions Underlying Andragogy." https://hrdevelopmentinfo.com/malcolm-knowles-and-the-six-assumptions-underlying-andragogy/ (Accessed 1 October 2021)

Adult Learning Principles and Conditions

Following are principles that apply to adult learning based on the work of Gerald Pine and Peter Horne. These principles are aligned with Knowle's assumptions about adult learning, and highlights its highly personal and multi-dimensional nature:[14]

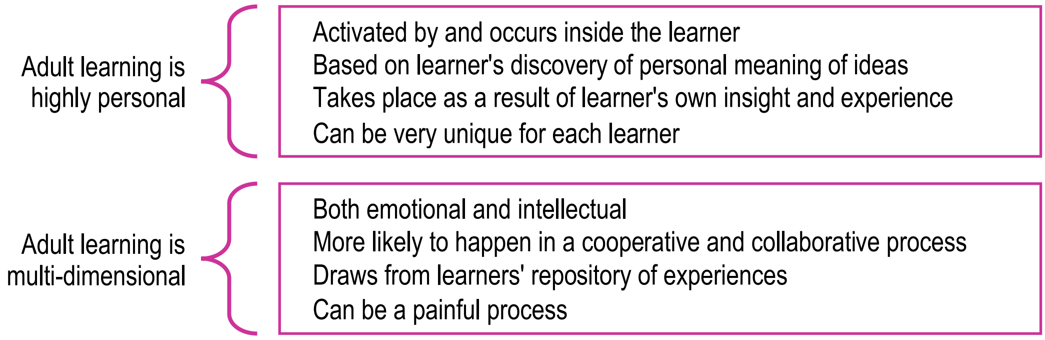


Figure 10. Adult Learning Principles

Given these principles, Pine and Horne drew up a set of conditions that will facilitate adult learning. According to them learning is facilitated in an environment where:

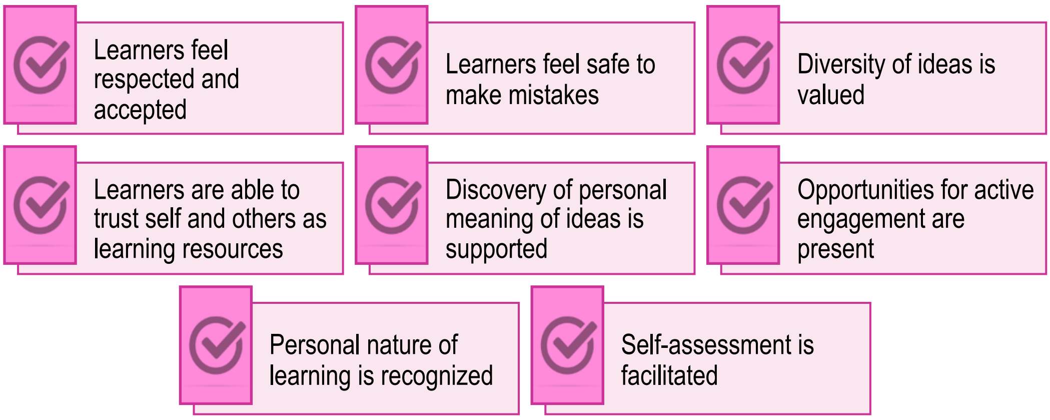


Figure 11. Conditions that Facilitate Adult Learning

Experiential Learning Cycle

According to David Kolb's Experiential Theory, "Learning is the process whereby knowledge is created through the transformation of experience."[15] He captures this process in a four-stage Experiential Learning Cycle (ELC), also sometimes referred to as Adult Learning Cycle).

---

[14] Pine, G. and Horne, P. Principles and Conditions of Adult Learning (1999) in C. Ortigas, Group Process and the Inductive Method. Quezon City: Ateneo de Manila University

[15] Kolb's Experiential Learning Cycle. https://www.ryerson.ca/experiential/what-is-experiential-learning/understanding/Kolb/ (Accessed 1 October 2021)

The ELC suggests that learning is facilitated when a person moves along four stages:

1. A concrete experience – going through a new situation or event, or a variation of a prior experience
2. Reflective observation – reviewing and reflecting on the new experience, including inconsistencies between what has just been experienced and prior understanding
3. Abstract conceptualization – forming of new ideas and insights, generalizations or conclusions as a result of the new experience
4. Active experimentation – trying out what was learned by applying it and in the process, generating new experiences

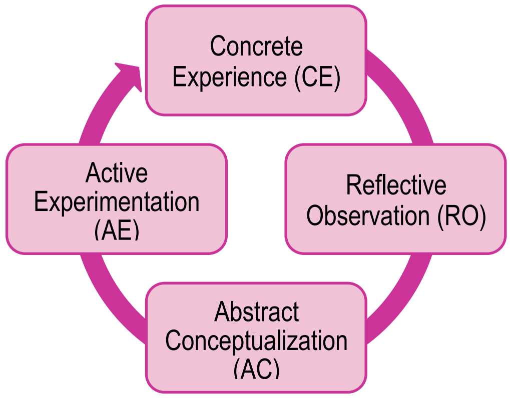


Figure 12. Experiential Learning Cycle

Learning Styles

Kolb's learning theory also sets out four distinct learning styles, which are based on the four-stage Experiential Learning Cycle.[16]

While there are many factors that affect one's preferred learning style (e.g., culture and social environment, educational and professional experiences, etc.) Kolb suggests that this is actually a product of two pairs of variables: how one approaches a task (processing), and how one feels or thinks about it (perception).

Since the two variables at the end of each axis (i.e., Feeling and Thinking, and Watching and Doing) cannot happen at the same time, people have to make a choice, and this affects their preferred learning style (Figure 13). This explains why some learners are more engaged during actual activities, while others are more participative during processing discussions.

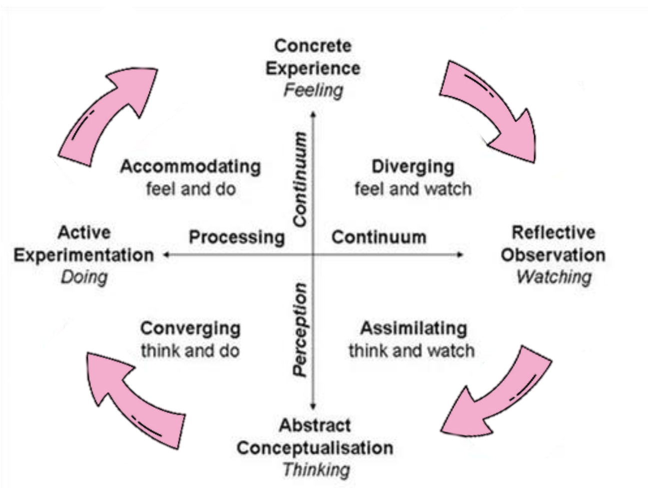


Figure 13. Learning Styles

[16] McLeod, S. A. (2017, October 24). Kolb - learning styles and experiential learning cycle. Simply Psychology. https://www.simplypsychology.org/learning-kolb.html (Accessed 2 October 2021)

Table 2 shows the combinations of the ELC variables and the resulting learning style preferences.

Perception Continuum		Processing Continuum	
		Active Experimentation (Doing)	Reflective Observation (Watching)
	Concrete Experience (Feeling)	**Accommodating (CE x AC)** ▪ Takes a "hands-on" and experiential approach ▪ Relies on intuition or gut instinct rather than logic ▪ Likes new challenges and experiences ▪ Uses other people's information rather than do own analysis ▪ Attracted to tasks that require execution of plans	**Diverging (CE x RO)** ▪ Views situations from different perspectives ▪ Tends to gather information and use imagination in solving problems ▪ Works well with groups ▪ Listens and receives feedback openly ▪ Great at generating ideas (e.g., brainstorming)
	Abstract Concept-ualization (Thinking)	**Converging (AC x AE)** ▪ Applies learning to solve practical issues ▪ Likes technical tasks more than working on social or interpersonal concerns ▪ Great at finding practical applications for ideas and theories ▪ Prefers experimenting with new ideas and simulating	**Assimilating (AC x RO)** ▪ Likes clear explanation and concise, logical approach ▪ Excels at grasping and organizing information ▪ Works better with ideas and concepts than people ▪ Prefers listening to lectures, reading, and exploring analytical models

Table 2. Combination of ELC Variables and Learning Styles

Kolb's Experiential Learning Cycle and Learning Styles are important considerations when designing and implementing LDIs, particularly in ensuring that they provide a range of experiences that allow learners with varied learning preferences to move through the ELC stages.

Multigenerational Learners

Most organizations now have a workforce that is comprised of people from several generations. The age diversity in the current workforce is actually the widest ever, with some organizations having five generations working together with ages ranging from early 20's to late 70's (Table 3).[17]

The generational differences listed in Table 3 are not exhaustive or definitive. They may not be true for all members of a specific generation and may even be considered as stereo-typical. Nonetheless, there are also real generational diversity in values, communication styles, and work habits that are present in the workplace, which may need to be considered in L&D.

[17] Boatman, A. (n.d.) Understanding Today's Multigenerational Workforce: Benefits, Challenges, and 9 Best Management Practices. AIHR Academy. https://www.aihr.com/blog/multigenerational-workforce/

Generational Differences	Traditionalists (Born pre-1946)	Baby Boomers (1946-1964)	Generation X (1965-1980)	Generation Y Millennials (1981-1996)	Generation Z (Born post-1996)
Communica-tion and Feedback Needs	No news is good news	Performance review once a year is sufficient	Frequent, honest feedback	Immediate feedback	Frequent, prompt, swift, and face to face feedback
Working Styles	Do what you're told, earn your way up the hierarchy by seniority	Compete and grind your way to the top	Independent, divide and conquer approach	Highly collaborative, speaking up is important	Self-directed and independent approach to learning
Motivation and Priorities	Fair treatment Passing time	Recognition Staying relevant and useful	Provision	Find community, meaning, and purpose	Supportive leaders, meaning, and purpose
Work Values and Expectations	Loyalty I am at my workplace for 8 hours. If necessary, I stay to complete a task	Drive I am at my workplace for 8-10 hours. If necessary, I will take work home.	Efficiency I try to complete my work at the office. If necessary, I will take it home.	Work-life integration This is a 24/7 world. I work until 5:00 PM and will log in tonight.	Work-life balance I don't want to think about work after working hours.

***Table 3. Multigenerational Workforce*[18]**

Traditionalists and Baby Boomers have been exposed since their early education to more formal and classroom-based learning approaches. Gen-Xers, GenYs, and GenZ's are used to more exploratory and digital learning modes early in their learning years. Most of the younger learners (Gen Ys and GenZs) are connected 24/7 via a PC or laptop and/or mobile device, and highly active users of a wide range of social media tools.[19] They are also referred to as the Net Generation or NetGen, and considered the first "digital natives", and have practically grown up holding gadgets (e.g., playing virtual games).[20]

[18] Taken from: ROHEI (2019). The Multigenerational Workforce: From Challenges to Opportunities. https://www.rohei.com/resources/the-multigenerational-workforce-from-challenges-to-opportunities (Accessed 2 October 2021)
[19] http://www.learningsolutionsmag.com/articles/80/
[20] Reeves, T. C. (2006). Cited in Reeves, T.C. "Do generational differences matter in design?" https://paeaonline.org/wp-content/uploads/imported-files/10c-Gen-Diff-Matter.pdf (Accessed 2 October 2021)

> There have been no definitive research-based findings though that are drawn from learning theories that support the efficacy of different instructional designs or strategies across the generations. Nor is there a compelling case for the development of a new instructional design model to accommodate generational differences.
>
> *Reeves, TC. "Do generational differences matter in design?"* https://paeaonline.org/wp-content/uploads/imported-files/10c-Gen-Diff-Matter.pdf

Instead of worrying about whether the younger generations will learn more from direct instruction or virtual reality games, it is suggested that L&D implementers: [21]

- Begin the L&D process by identifying specific learning needs of target learners
- Identify and design interventions using appropriate methodologies
- Develop learning resource packages that meet content and form standards
- Conduct iterative cycles of formative evaluation and refinements to ensure the soundness of instructional design
- Closely monitor L&D implementation to be able immediately address emerging needs of learners, regardless of their generational membership

These adult learning principles and conditions will be woven into the discussion of the different ADDIE phases. Figure 14 shows the different L&D models and how they can reinforce the ADDIE phases.

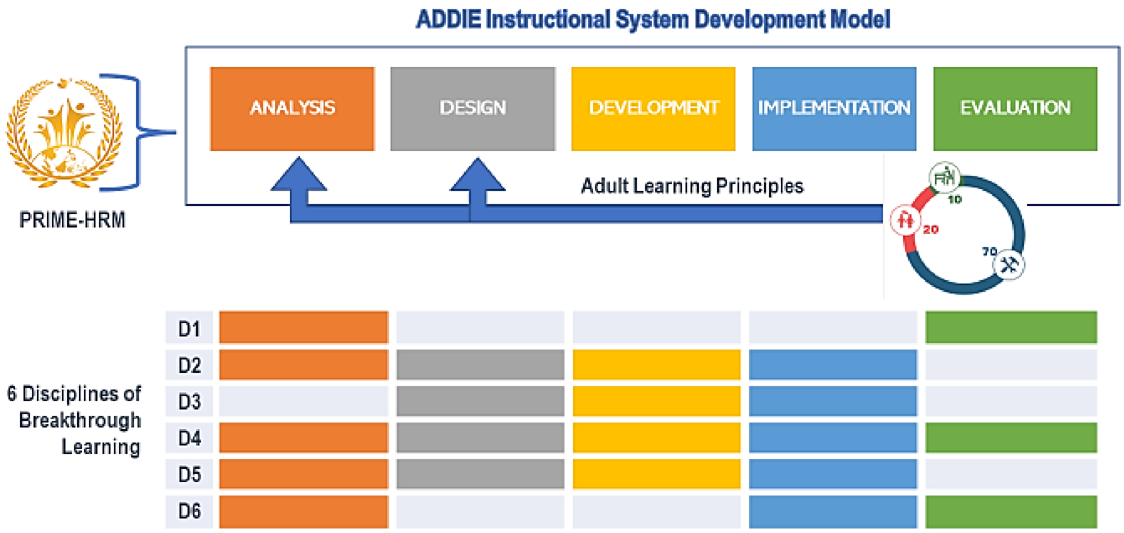


Figure 14. Synergy of L&D Frameworks and Models

The ADDIE as anchor for L&D management is strengthened by taking on different perspectives so that LDIs are not viewed as isolated events, but rather as strategic

[21] Adapted from: Reeves, T. C. (2006). Cited in Reeves, T.C. "Do generational differences matter in design?" https://paeaonline.org/wp-content/uploads/imported-files/10c-Gen-Diff-Matter.pdf (Accessed 2 October 2021)

interventions that are critical to improving organizational results. Applying the 70-20-learning model at the planning stage, particularly during the Analysis and Design phases allows for exploring a range of possible LDIs and identifying the most appropriate blend that can address learning and performance objectives.

The various adult learning principles and frameworks serve as the grounding for the identification of competency development needs of learners that impact on their performance, the design of interventions, development of learning resource materials, and implementation and evaluation of LDIs.

The 6D model enriches the execution of all the ADDIE phases, by weaving in elements and activities to ensure that learning transfer will happen in the workplace and lead to targeted competency development and organizational outcomes. Using the PRIME-HRM lens in reviewing and enhancing the L&D management processes will help DSWD in maintaining an L&D system that is responsive to the needs of its internal and external stakeholders.

Applying these models and frameworks in synergy will boost the worth of organizational investments in LDIs, whether in face-to-face, online, or blended modes, and translate these to value-adding service delivery.

In summary:

- Providing L&D interventions is a key approach in building competencies of people in organizations. It is focused on helping individuals acquire the necessary knowledge, skills, and attitudes for them to do their jobs better and contribute to enhanced institutional capabilities.
- The management of L&D needs to be viewed as a strategic function that is anchored on and support organizations' desired outcomes and thrusts. It is executed through a systematic process of analyzing needs, designing interventions, developing materials, and implementing and evaluating interventions (Analysis-Design-Development-Implementation-Evaluation or ADDIE).
- Applying the 6D perspective in the management of L&D can help ensure that investments will yield results that support achievement of organizational goals, and in the process reduce "scrap learning." This involves: 1) Defining organizational outcomes, 2) Designing the complete experience, 3) Delivering for application, 4) Driving learning transfer, 5) Deploying performance support, and 6) Documenting results.
- An appropriate blend of varied L&D interventions can provide powerful learning. This means going beyond formal classroom learning (which according to the 70-20-10 learning model only accounts for 10% of how people learn), and providing more workplace and relationship-based L&D opportunities.
- One framework that organizations can use in reviewing its management of L&D is the CSC's PRIME-HR, which defines three pillars of L&D: Governance and Enabling Mechanisms, Planning and Monitoring and Evaluation, and Execution. Each pillar contains a set of indicators along four maturity levels (Transactional, Process-defined, Integrated, and Strategic).
- A sound grounding of adult learning principles and frameworks is important for the effective management of L&D. This includes an understanding of how adults learn and the conditions that facilitate adult learning, as well as the recognition of diverse learning styles and the presence of multi-generational learners in the workplace.

IDCB PLANNING

This section of the L&D Guidebook will cover:

- Purpose of IDCB plan
- Sections of the IDCB plan
    - Institutional Development Plan
    - Capability Building Plan
- Clients of LDIs in the IDCB
- IDCB and ADDIE

IV. IDCB Planning

The Institutional Development and Capability Building Plan (IDCB) plan "establishes an organization-wide, comprehensive, harmonized and coordinated IDCB Program of the Department."[22] The plan has two sections:

- ➲ The Institutional Development Plan reflects the identified key result areas of each OBS and the corresponding planned interventions or strategies in building organizational capacities and competencies.
- ➲ The Capability Building Plan consists of learning activities or interventions aimed at strengthening and developing knowledge and skills, as well as changing attitudes or behaviors of individuals to perform core functions sustainably and to continue improving over time.

The Capability Building Plan comprises LDIs to be provided to DSWD clients, including:

Intermediaries

- Local Government Units (LGU)
- National Government Agencies (NGA)
- Non-Government Organizations (NGO)
- People's Organizations (PO)
- Volunteers (Vol)

Stakeholders

- Academe (AC)
- Religious (Rel)
- Business Sector (BS)
- Media (Med)

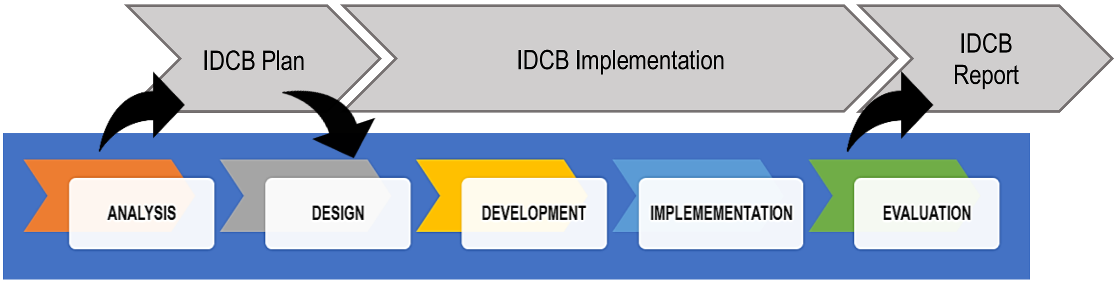
DSWD

- Field Office (FO)
- Central Office Staff (CS)
- Centers and Institutions Staff (CIS)
- Attached Agencies
    - Council for the Welfare of Children (CWC)
    - Intercountry Adoption Board (IcAB)
    - Juvenile Justice and Welfare Council (JJWC)
    - National Council on Disability Affairs (NCDA)
- Supervised Agencies
    - National Anti-Poverty Commission (NAPC)
    - National Commission on Indigenous Peoples (NCIP)
    - Presidential Commission for the Urban Poor (PCUP)

Figure 15. Clients of LDIs

The IDCB is an important document that captures the line-up of LDIs for a given year. It is related to the ADDIE model in that LDIs go through ADDIE phases. Each LDI in the IDCB is identified based on a prior needs analysis and prioritization. LDIs are designed and developed for implementation and evaluated against learning and organizational objectives set at the beginning of the intervention. Results of LDIs are incorporated in the IDCB Report on accomplishments.

[22] Department of Social Welfare and Development (2010). Memorandum Circular 11, Series of 2010 – Guidelines in the Preparation and Submission of IDCB Plans and Accomplishment Reports.


IDCB Plan
IDCB Implementation
IDCB
Report
ANALYSIS
DESIGN
DEVELOPMENT
IMPLEMEMENTATION
EVALUATION

ANALYSIS

This section of the L&D Guidebook will cover:

- Purpose and value of the Analysis phase
- Scope and outputs of the Analysis phase
    - Scoping the LNA
    - Planning the LNA
    - Developing data gathering tools
    - Collecting data
    - Analyzing and validating data
    - Prioritizing competency development needs
    - Summarizing findings
    - Generating recommendations
    - Preparing the LNA Report
- Key roles in the Analysis phase

The Field Office has been receiving requests for LDIs from Provincial Social Welfare Development Officers (PSWDOs). They are requesting LDIs for leadership development, case management, change management, and others.

A team has been convened to sort out these requests. They had a number of questions.

V. Analysis

Analysis is the cornerstone of learning and development. It is the process for identifying learning needs to improve performance, and provides the foundation for designing, developing, implementing, and evaluating LDIs that address those needs.

Figure 16. Analysis Phase

A. Purpose and Value of the Analysis Phase

Learning needs analysis (LNA) ensures that LDIs are evidence-based so that investments of efforts and resources are optimized. It focuses LDIs, not just on learning, but also on making an impact on individual and organizational performance improvement.

- **It validates if an LDI is the best solution**. It ascertains whether the causes of performance gaps are mainly due to lack of competencies, rather than other factors that cannot be address by an LDI.
- **It provides the basis for LDI evaluation**. It identifies desired outcomes of LDIs and defines learning objectives. It provides the baseline against which results will be compared.
- **It determines appropriate LDI**. It provides recommendation on suitable types of L&D interventions and delivery modes to address identified learning needs.
- **It provides "field" relevance to LDI design**. It generates data on learners' workplace context and performance issues that can be referenced in designing the LDI to relate learning to application on the job.
- **It fosters shared understanding and generates support and buy-in**. It calls for collaboration and shared responsibility among parties that have a stake in the success of the LDI, including the LMT, managers, supervisors, and staff of DSWD, and external clients.

B. Scope and Outputs of the Analysis Phase

Learning needs analysis covers the following elements:

- Scoping the learning needs analysis

- Planning for learning needs analysis and preparing the Learning Needs Analysis Plan
- Developing learning needs analysis tools
- Collecting data
- Analyzing and validating data
- Prioritizing competency development needs
- Summarizing findings
- Generating recommendations
- Preparing the Learning Needs Analysis Report containing prioritized competency gaps, and recommendations on LDIs to address them

C. Key Role Players in the Analysis Phase

The Analysis phase requires the involvement of the following key players:

Key Player	Responsibilities
Learning Management Team (LMT) • Team Leader • Specialists with grounding on: ○ L&D ○ basic research methods ○ LDI types and delivery modes	▪ Formulates the needs analysis plan ▪ Develops needs analysis processes and tools ▪ Conducts needs analysis for target groups of learners ▪ Prepares the needs analysis report
Supervisor/ Manager	▪ Identifies the "business"/ organizational rationale for needs analysis ▪ Collaborates with the LMT in defining the scope and objectives of the needs analysis ▪ Provides needed data on performance and competencies of target learners ▪ Participates as respondent to data gathering activities ▪ Validates findings of needs analysis ▪ Reviews needs analysis report and endorses it for management approval
Learner	▪ Participates as respondent to data gathering activities ▪ Validates findings of needs analysis
IT Specialist	▪ Provides technical assistance, as needed, in the setting up automated system for data gathering, processing, and analysis

Table 4. Key Players in the Analysis Phase

D. Analysis Processes, Guidelines, and Standards

The LNA Process

The process begins with scoping the LNA which involves defining its level/s of analysis, and organizational rationale. Given the scope, an LNA Plan is formulated to guide succeeding activities: developing appropriate tools; collecting data; analyzing and validating data; and communicating results through the LNA Report.

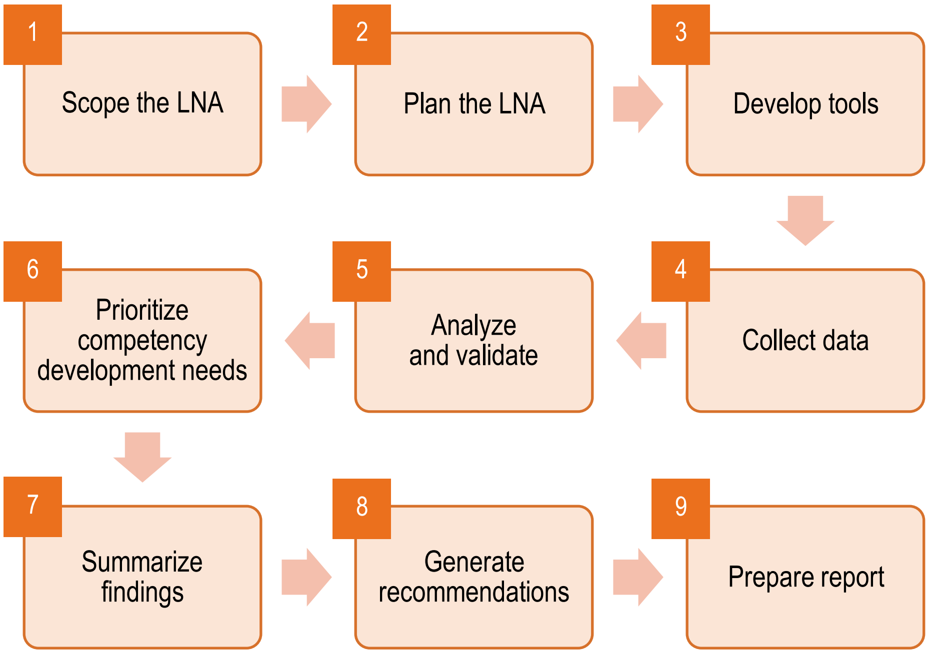


Figure 17. The Analysis Process

The steps in this section focus on group LNA, which is also used as building blocks when organizational LNA is called for. Processes for individual LNA are covered in the individual performance management and development systems in organizations, such as the DSWD Strategic Performance Management System (DSPMS), and career management systems. External clients may have similar systems in their own organizations.

1. Scope the LNA

Scoping the LNA involves two tasks: (1) defining the organizational rationale for the LNA and (2) determining the levels at which the LNA is undertaken.

Figure 18. Some Sources of Learning Needs

Define organizational rationale for the LNA. It is important to describe the "business" need for it or why it is necessary to conduct the LNA, such as to address performance issues, support new strategies, implement better systems, and others.

A prevailing performance concern is usually behind a request for an LDI. That concern is the situation that is expected to change or improve through the implementation of an LDI.

"We need a program" is not sufficient reason to create one.

Pollock, Roy V. H.; Jefferson, Andy; Wick, Calhoun W. (2015). The Six Disciplines of Breakthrough Learning (p. 48).

It is therefore necessary in LNA to clarify the underlying reasons for the need for an LDI. This requires gaining a good understanding of the organizational unit or group for which the LNA is conducted. It involves:

- Studying key functions and processes of the office or job group as well as its current performance successes and challenges, and factors that facilitate and hinder performance.
- Reviewing available documents pertaining to individual and office performance, implementation plans produced by the group, M&E reports, accomplishment reports, and other relevant documents.
- Getting input from the head of unit and other key people to get a better grasp of what is hindering performance.

At this point, several questions will have to be answered about the performance improvements and outcomes expected when the LDI is successful, and the answers will form the anchor for succeeding phases for the ADDIE (Figure 21).

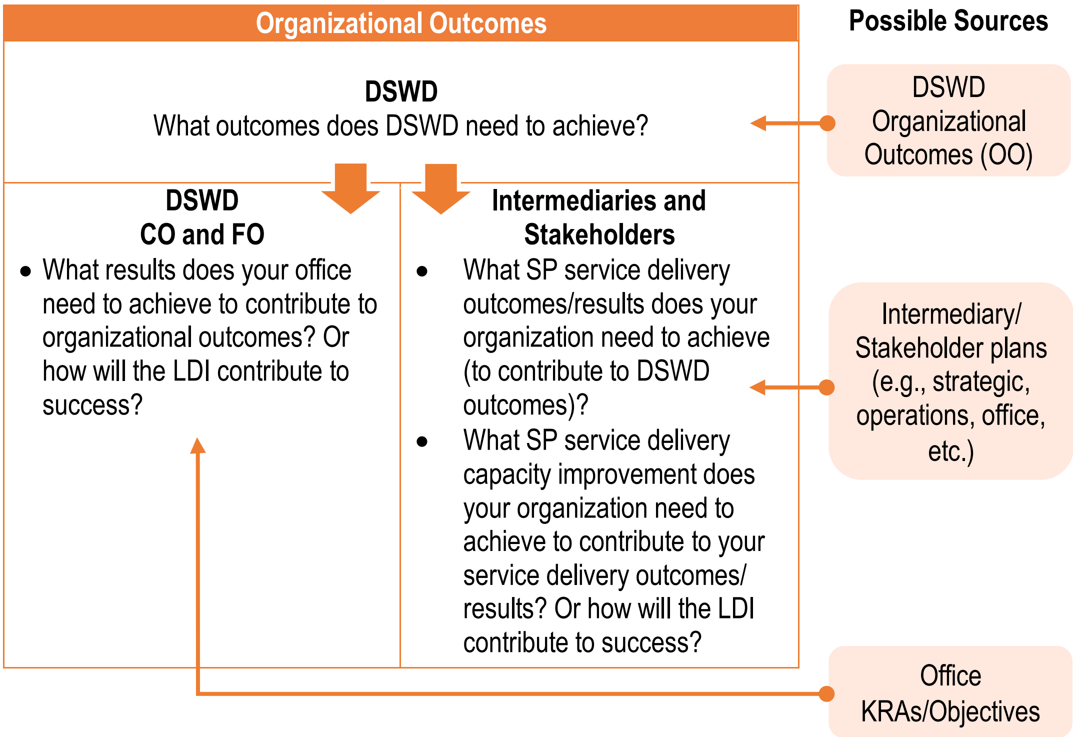


Figure 19. Organizational Rationale for LNA, and Possible Sources

Succeeding steps in the LNA may further clarify and refine expected results, but it is important from the beginning that expectations are discussed and articulated to provide an anchor to the LNA.

Identify levels of analysis. Learning needs are uncovered at one or more levels: individual, group, and organizational. Figure 22 briefly describes each of these levels.[23] LNA can begin at any of these levels depending on the where the performance concerns are.

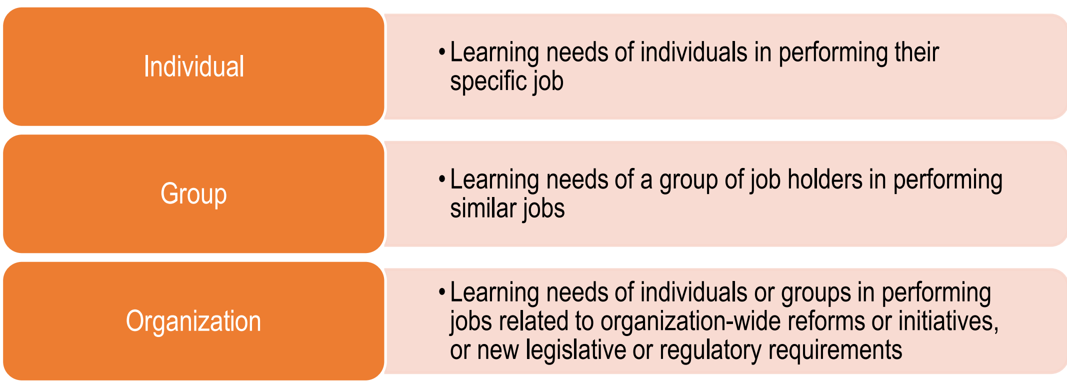


Figure 20. Levels of Needs Analysis

[23] Adapted from Chartered Institute of Personnel Development (2006). *Identifying Learning Needs in Organizations* in Learning and Development.

Individual LNA typically happens within the organization's individual performance management system, such as the DSPMS and specifically during the Development Planning stage (Figure 23). After the Review and Evaluation of performance, supervisor and employee identify strengths and areas for development. This process includes identifying competencies that need to be strengthened to further improve performance. These learning needs and corresponding LDIs are included in the employee's Individual Development Plan (IDP).

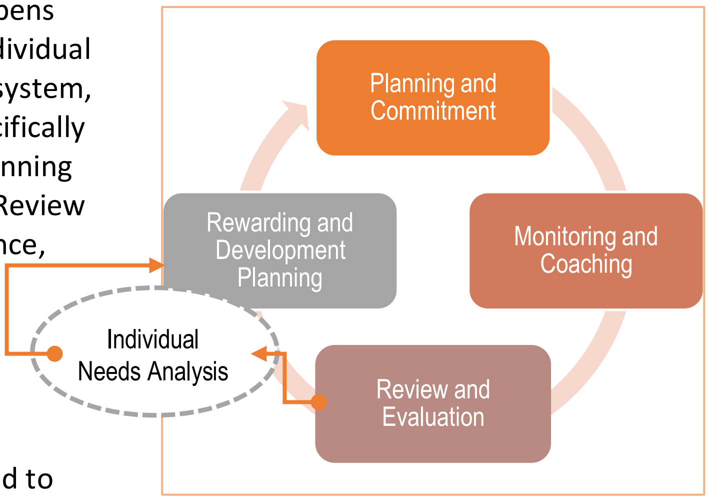


Figure 21. Individual Needs Analysis in Performance Management

Individual LNA may likewise be conducted when an employee is given a new role, promotion, new project, or others that require new competencies. It is also done as part of career and succession management.

Group LNA is the assessment of learning needs of an organizational unit, team, office or group of job holders to meet performance requirements of a specific functional area.

Organizational LNA may coincide with regular planning process, such as strategic and annual planning, and cover all units or offices within the organization. It becomes the basis of an L&D plan that supports organizational strategy. It may also be prompted by shifts in strategic direction and priorities that create new performance expectations, and spawn learning needs. It may arise as well from external factors such as new legislation or regulations that require compliance from the organization.

At the start of an LNA, it is important to identify the level or levels it will focus on. It must be recognized however that the levels of LNA are related, and are not mutually exclusive. For instance, a change in organizational priorities may cascade into group or office learning needs depending on the role of that office in the organizational strategy. The role of the office in turn may introduce new processes or responsibilities requiring upskilling or different competencies of teams or individuals within the that office.

> A thorough learning needs analysis will ensure that resulting learning interventions are fully in support of business needs…The ability to prove this link to business goals is fundamentally dependent on the accuracy and thoroughness of the original learning needs analysis.
>
> *Chartered Institute of Personnel Development (2006). Identifying Learning Needs in Organizations in Learning and Development.*

2. Plan the LNA

A Learning Needs Analysis Plan serves as a guide for carrying out the various steps in the process. It includes the following information:

> **Learning Needs Analysis Plan**
> - Objectives of the LNA
> - Data requirements and data sources
> - Approach, methodology and data gathering tools
> - Implementation details

Objectives of the LNA. Articulate the purpose, and establish the focus of the LNA. Collaborate with head/s of units or key members of the target group in formulating objectives.

Some tips on LNA objectives:

- Identify a primary objective, indicating the specific target group, and performance and/or competency areas to be assessed.
- If needed, specify secondary objectives. These are not the main goals, but they will help in attaining the main objective. Figure 24 shows a sample primary and secondary objectives.

> **Determine L&D interventions that will address learning needs in case management among MSWDOs**
> - Determine performance requirements and standards on case management competency
> - Examine related performance issues and root causes
> - Distinguish competency-related factors
> - Identify learning needs on case management
> - Identify employees who need to be trained
> - Determine appropriate learning methodologies for target employees

Figure 22. Sample Primary and Secondary LNA Objectives

- Begin objective statements with action words, such as in the sample above. Other examples are shown in Figure 25.
- An LNA may be conducted for other purposes, such as:
  - Provide basis for development of an L&D or CB plan

Identify	Assess/ reassess	Develop
Design	Implement	Examine
Analyze	Interpret	Evaluate

Figure 23. Action Words

- Justify investment in LDI
- Generate data that will be useful in measuring impact of LDIs
- Secure management support for proposed learning activities
- Guide/validate the design of interventions

Data requirements and data sources. Identify the nature of the data needed to achieve the LNA objectives, and where to obtain the data. Sources of data may include people who will be respondents to data-gathering activities, and documents that need to be reviewed. Some examples of data requirements and possible source include:

Category	Data Requirements	Possible Data Sources
Performance	• Performance targets and standards • Actual performance level • Reasons for discrepancies between actual accomplishments and targets	• Performance Commitment and Review or other similar documents • Accomplishment reports • Supervisor • Job holder/target learner • Clients
Competency	• Competency required for the job • Job holder's current competency level	• Competency model for the job • Job holder's/target learner's competency profile • Human Resource Office
Learner Profile/ Demographics	• Position/Role • Office/Location • Age • Gender • Years in current position • Years in organization • Past training • Readiness for online learning	• Job holders/target learners • Supervisor • Human Resource Office

Table 5. Data Requirements and Data Sources

Approaches. There are two main approaches to LNA: problem-solving, and competency-based.[24] These approaches may be used in combination, depending on the objectives of the LNA.

	Problem-Solving Approach	Competency-based Approach
Description and use	This approach, also referred to as performance gap-based approach, compares actual performance against	This approach, also called the opportunity-based, assesses actual levels of proficiency against the

[24]Adapted from American Society for Training and Development (2008). Train the Trainer Volume 2 Instructional Design and Implementation. Baltimore: ASTD Press.

	Problem-Solving Approach	Competency-based Approach
	requirements or targets, and analyzes causes of any shortfalls. It is used when identifying learning needs related to performance issues.	required competency levels for the job. It is used when there are established competency models and tools prescribed for particular jobs, e.g., the LSWDO Competency Assessment.
Advantages	➲ It responds to immediate performance deficiencies by isolating causes related to competencies, or knowledge, skills, and attitudes. ➲ It is particularly useful when performance standards are defined but there is no competency model in place.	➲ It responds to current as well as future competency requirements. ➲ It facilitates the development of a complete set of sequential learning or curriculum for a particular job.
Disadvantages	➲ It may lead to a fire-fighting approach to learning if it is the only basis for LDIs. ➲ It may be short-sighted and miss opportunities to prepare for future advancement or changes in roles and expectations.	➲ It may not lead to solutions to immediate problems. ➲ It requires more time to do a thorough analysis of behaviors required in successfully performing a job.

Both problem-solving and competency-based approaches to LNA lead to the identification of competency gaps or learning needs that become the basis for LDIs (Figure 26).

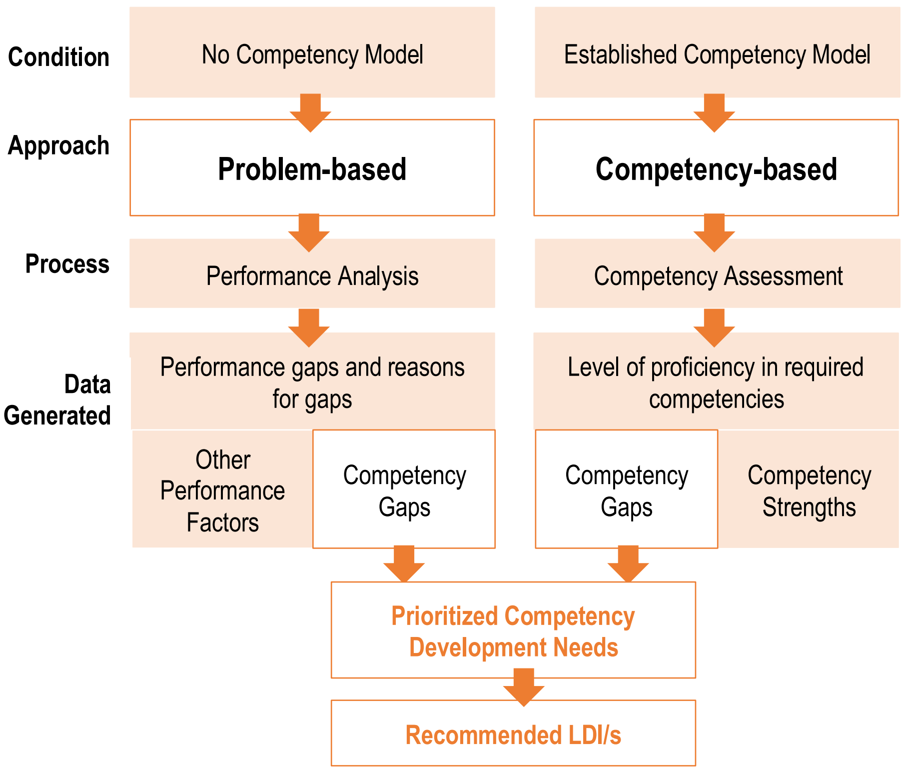


Figure 24. LNA Approaches

Annex 1 provides a performance analysis template that can guide the process for a problem-based approach, and Annex 2 presents an example of a competency assessment survey used in a competency-based approach.

Both approaches make use of similar methods and tools that will be discussed in the next section. They differ in the kind of data they collect and analyze but both aim to identify competency development needs.

Methodologies and tools. Select appropriate methods for gathering the data required to meet LNA objectives. Table 8 presents three broad types of methods, the pros and cons of each method, and some examples.

	Formal Methods	Informal Methods	Rapid Appraisal Methods
Description	• Well-structured and collects in-depth information	• Involves informal observations and conversations with target respondents/ beneficiaries	• Quick ways to gather the views and feedback of beneficiaries and other stakeholders
Pros	• High validity and replicability • Often used to gather data on large population	• Cheap and easy but usually not sufficient	• Fairly cheap • Reasonably accurate • Can be broad or narrowly focused
Cons	• Often narrowly focused • Can be expensive	• Prone to objectivity and validity issues • Useful information but need to validate it	• Not always easy to repeat • Not usually useful for collecting data that can be used to generalize to a large population
Examples	• Large scale surveys (e.g., Service Delivery Capacity and Competency Assessment for LSWDOs, Organizational Competency Assessment Tool for internal DSWD learners)	• Conversations • Observations during visits • Discussions	• Focus group discussion • Key informant interview • Direct observation • Mini survey

Source: CIDA RMB Toolkit

Table 6. Formal, Informal, and Rapid Appraisal Methods

Table 9 describes common data collection methods and indicates their corresponding tools.[25] More information on appropriate uses, advantages and disadvantages of each method are found in Annex 3.

Method	Description	Tool
Documents Review	Involves analysis of reports, records and other documentations that can indicate trends, performance levels, etc.	Document review guide (what to look for)
Observation	Method of gathering visual information on what happens, what your object of study does or how it behaves; watching how people perform their job, documenting their actions, behaviors and methods	Observation guide or checklist
Interview	Collection of data by asking questions from an individual or group considered knowledgeable about the competency of target learners; useful in gathering feedback on learners' competency level from various sources	Interview guide
Focus Group Discussion	Obtaining in-depth information on concepts, perceptions, and ideas of a group of carefully selected people; provides opportunity to collect/validate and process data from different sources	FGD questions and process guide
Survey	Involves developing a set of questions or statements that can surface data related to learners' proficiency level	Survey questionnaire

Table 7. Data Gathering Methodologies and Tool

Implementation details. Prepare a work plan for the LNA, specifying activities, person/s responsible, timeframe, and resources needed.

An LNA Plan Template is found in Annex 4.

3. Develop data gathering tools

There may already be existing LNA tools that can be readily used, such as the Service Delivery Capacity and Competency Assessment (SDCCA) for LGUs and the Organizational Competency Assessment Tool (OCAT) used internally by DSWD. Other tools may need to be developed. Below are some guidelines and tips on developing data-gathering tools.

Document Review Guide. This is a tool that will help the LMT in planning the document review process. The tool may have different formats and is developed to capture the following steps:

[25] Adapted from American Society for Training and Development (2008). Train the Trainer Volume 2 Instructional Design and Implementation. Baltimore: ASTD Press. (pp. 26-34)

1. Identify data required
2. Determine documents to review
3. Specify sources of documents
4. Summarize data collected
5. Include remarks, if any (such as observations about the data, and data gaps)

A simple form to summarize data collected from reviewing documents is found in Annex 5. It may be customized further to suit the objectives of the review.

Interview Guide. This contains a pre-determined list of questions that will be asked by an interviewer during the interview. The steps in developing an Interview Guide are:

1. Review your objectives and data requirements in the LNA Plan.
2. Select the number and type of people to be interviewed. Interview respondents must:
    - Have direct opportunity to observe the performance of target job holder
    - Have particular knowledge or expertise regarding the targeted job holders
    - Have knowledge about new performance standards
3. Develop an Interview Guide. It has three parts: opening, planned questions, and closure.
    a. The **opening** provides instructions or reminders to the interviewer on how to open the interview. For example:
        - Open the interview by setting a pleasant yet professional tone.
        - Explain the purpose of the interview (purpose should be stated on the guide for the interviewer's reference).
        - Assure confidentiality.
        - State how long the interview will take.

    b. Planned questions may be any of three types: theoretical, leading, and behavioral.
        - Theoretical questions - produce theories opinions or general answers. They may be used to generate data on job requirements, general views about performance issues and possible causes.
        - Leading questions - elicit a specific response from the person being interviewed. They may be used to check assumptions, get the conversation started when the interviewee is having difficulty responding to questions.
        - Behavioral questions - elicit information about how a person acted in or dealt with specific past situations. They

are used to generate critical incidents that demonstrate effective or ineffective competencies.

A guide on Planned Questions in Interviews is found in Annex 6.

c. The closure consists of instructions or reminders to the interviewer on how to close the interview. For example:

- Check if the interviewee has any further questions or any information to add
- Inform the interviewee how the results of the study will be communicated (if applicable)
- Thank the interviewee for taking the time for the interview

A sample interview guide is provided in Annex 7.

4. Train the interviewers. Once the interview guide has been developed, orient interviewers to ensure they have shared understanding of the questions and the kind of data that need to be elicited from respondents. This will enhance consistency in the quality of data that will be gathered.

5. Pilot-test the guide. It is important to try out the interview guide to check clarity of questions, and if they elicit the right kind of data from respondents. The guide is refined based on feedback from interviewers and trial respondents.

Observation Checklist. This is a tool that observers use in gathering and recording data during an observation. The steps in planning for observations are as follows:

1. Identify critical processes and activities to be observed
2. Develop a list of behaviors and definitions
3. Design the Observation Checklist
4. Select the sites
5. Select the observers
6. Train the observers
7. Time your observations appropriately

Annex 8 provides a sample Observation Checklist.

FGD Guide. This tool contains a series of questions and prompts that serve as the roadmap and memory aid for the facilitator. Some guidelines:

1. Decide what types of participants you will need for each focus group. Each focus group should be made up of similar individuals,

e.g., all supervisors, all technical staff, etc. The number of FGDs will depend on how many different types of groups from which you want to gather information.

2. Formulate questions:
   - Use open-ended questions
   - Use neutral questions as opposed to judgmental questions
   - Avoid questions with multiple ideas
   - Use a lot of probing questions

Annex 9 provides a sample FGD Guide.

Survey Questionnaire. This is a form consisting of a set of questions used to gather information about a subject or subjects. Following are the steps in developing a survey questionnaire:

1. Define your objectives and data requirements
2. Select the type and number of respondents
3. Develop questions that clearly communicate what you want to know
4. Decide when to use close-ended versus open-ended questions
5. Include demographic questions
6. Place questions in a logical order that flows well
7. Pilot test the questionnaire

Some tips:

- When there is a large number of target learners, use appropriate sampling techniques.
- Use your identified data requirements in the LNA Plan as guide for possible survey items.
- Avoid too many open-ended questions, lengthy items, complex jargon, unfamiliar acronyms, double-barreled items, and making the survey too long.
- Make items readable.
- Use bi-lingual terms or translate into vernacular, if necessary.

See Annex 10 for a Quick Guide on Developing Survey Questionnaires, and Annex 2 for a sample survey.

Online learning readiness assessment survey. When considering online learning as part of an LDI, it is important to gauge the readiness of target learners, and check if online learning is a feasible and appropriate option. A suggested online learning readiness assessment tool is found in Annex 11, and includes the following dimensions: [26]

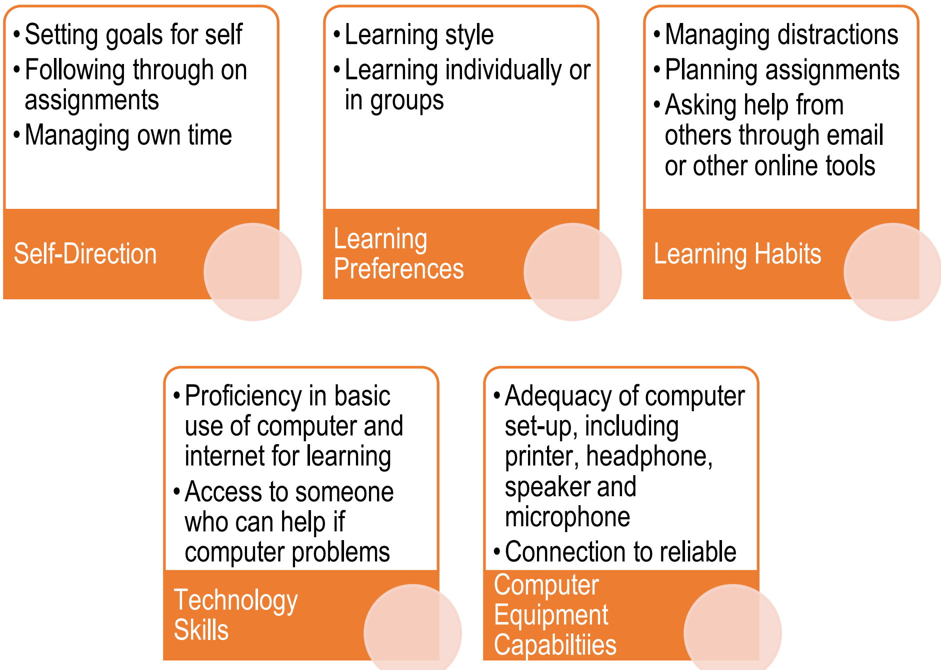


Figure 25. Dimensions of Online Learning Readiness

4. Collect Data

Once tools have been prepared, data gathering can begin. Here are some tasks before and during data collection.

Documents Review

When	Tasks
Before the review	• Determine availability of documents prior to actual review • If any is not immediately available, decide how much time you are ready to spend waiting for it to be located • Organize the collection of documents with sources

During the review

	• Compile documents relevant to your analysis
	• Scan documents to find out if these contain needed information
	• Record data in Documents Review Form
	  ○ Summarize information from documents reviewed
	  ○ Identify data gaps
	  ○ Note down other observations, especially pertaining to accuracy of data

[26] Adapted from Online Learning Readiness Questionnaire, Pennsylvania State University, http://tutorials.istudy.psu.edu/learningonline/ORQ/ORQ.htm.

When	Tasks
	• Determine accuracy of documents • Understand how and why the documents are produced • Focus review on data that will help achieve the review objective/s • Ensure confidentiality

Interview

When	Tasks

Before the interview	• Schedule the interview to minimize work disruption
	• Select a private, comfortable, safe and quiet venue
	• Prepare for the interview
	  ○ Review interviewee's profile
	  ○ Become familiar with the Interview Guide

During the interview 	• Seek permission if you plan to record the conversation • Put the interviewee at ease at the start by asking general questions • Shift to more specific or sensitive questions gradually • Keep an open mind and be mindful of your non-verbal communication • Listen to understand • Keep the interview focused on planned discussion topics • Probe as needed • Observe quality of responses • End the interview on a positive note • Write additional notes soon after the interview

Observation

When	Tasks
Before the observation	• Schedule the observation to minimize work disruption • Review the Observation Checklist and become familiar with the specific behaviors to observe and assess
During the observation 	• Explain the purpose • Use narrative statements and checklists to describe behaviors and conditions • Stay close without being obtrusive • Consult reports, records and staff to validate data at certain points of the process • Share the results with the group prior to report writing

Focus Group Discussion

When	Tasks

Before the FGD	• Schedule the FGD to minimize work disruption
	• Select a comfortable, safe and quiet venue
	• Prepare for the interview
	  ○ Review the profile of the group
	  ○ Review the FGD Guide

During the FGD 	• Ensure participation of all group members • Steer discussion as needed • Assign a documenter who will record and take notes on discussions • Limit the discussion to no more than 1 ½ hours

Survey

When	Tasks
Before the survey	• Upload questionnaire in electronic survey application • Notify target respondents through email and provide link to survey • If needed, prepare and distribute hard copies of the questionnaire for those who are not able to access the electronic survey form

During the survey period

	• Send email reminders to respondents to encourage them to accomplish the survey
	• If administering survey in person:
	  ○ Introduce yourself and your role in the LNA
	  ○ Ensure that objectives are communicated
	  ○ Explain the data collection process, i.e., instructions, tool/s, timing
	• Always thank respondents
	• Assure confidentiality of responses
	• Provide information on how the data will be used
	• If possible, share results with respondents

5. Analyze and validate data

There are two types of data analysis, as described in Figure 28. LNAs may use a combination of these types to get a fuller appreciation of and insights about the data.

Quantitive Analysis	Qualitative Anaysis
• Involves numerical data • Data collected through surveys • Uses statistical methods to describe, summarize and compare data	• Involves non-numeric data, e.g., text, narratives • Data collected through interviews, observation, FGD • Involves interpreting and understanding textual or visual data

Figure 26. Types of Data Analysis

Quantitative Analysis. Perform quantitative analysis on numerical data collected from methodologies such as surveys, following these steps:[27]

1. Encode, collate and tabulate data.
2. Conduct quantitative data analysis. Some of the most commonly used statistics are frequencies, percentages, and descriptive statistics (i.e., mean, median and mode).
3. Review and interpret data. Identify patterns in the data such as similarities and differences among responses from respondents with different characteristics. Reflect on what might explain these patterns.
4. Summarize the data. Develop tables, graphs, and charts to summarize findings, considering the target audience or user of results.

Qualitative Analysis. Perform qualitative analysis on non-numeric data collected from methodologies such as interviews, observations, and focus group discussions.[28]

1. Review the data to get a good understanding of the content, noting initial impressions that may be useful for interpretation.
2. Organize the data. Cluster data into themes, such as by topic, by type of respondent, by data collection method, and others. LNA objectives can guide this process.
3. Categorize the data. Identify patterns and label themes within the data. Read and re-read the data to uncover all relevant themes. Qualitative data analysis is an iterative process.

---

[27] Adapted from Center for Disease Control (2009). Evaluation Briefs No.20, July 2009: Analyzing Quantitative Data for Evaluation. Retrieved from https://www.cdc.gov/healthyyouth/evaluation/pdf/brief20.pdf, accessed on 20 March 2018, and The Pell Institute (n.d.). Evaluation Toolkit: Analyze Quantitative Data. http://toolkit.pellinstitute.org/evaluation-guide/analyze/analyze-quantitative-data/, accessed on 20 March 2018.

[28] Ibid.

4. Interpret the data by reviewing each theme, and identifying similarities and differences, relationships, and others.
5. Develop a list of key points or important findings discovered from the analysis above, particularly the critical performance and competency gaps of the target group.
6. Summarize the data. Prepare initial draft of findings, keeping in mind the target audience. Include quotes or descriptive examples to support findings.

A Quantitative and Qualitative Analysis Guide is found in Annex 12.

Validation. This is the process of checking the accuracy of data and findings, and appropriateness of analysis and interpretation.

- Identify stakeholders who can verify and provide further inputs to the LNA. They may include the immediate supervisor of jobholders, the jobholders themselves, and others who are familiar with the work of the target group, such as higher management and clients.
- Identify other documents that might corroborate or support findings, such as reports, records, and other relevant materials.
- Determine process for validation. Some of the data gathering methodologies previously mentioned may be applied for this purpose. Use multiple methods and data validation sources, as appropriate.
- Conduct the validation to check authenticity, trustworthiness, and dependability of data and findings. Qualitative and quantitative data can complement or validate one another.
- Update or revise data and findings, as needed, based on inputs from the validation.

Validation is an iterative process. It may be conducted at different stages of the LNA, e.g., validate preliminary findings, confirm prioritization of competency gaps, consult on initial recommendations on LDIs, etc. Validation promotes shared understanding and ownership of LNA results among stakeholders.

6. Prioritize competency gaps

The analysis of data should generate information on critical performance and competency gaps as well as non-competency related factors that hinder performance. The next step is to prioritize competency gaps, especially when a large number has surfaced through the analysis process.

A useful way to prioritize competency gaps is to use a set of criteria called the SUG, or seriousness, urgency, and growth potential. Figure 29 provides guide questions for each criterion.

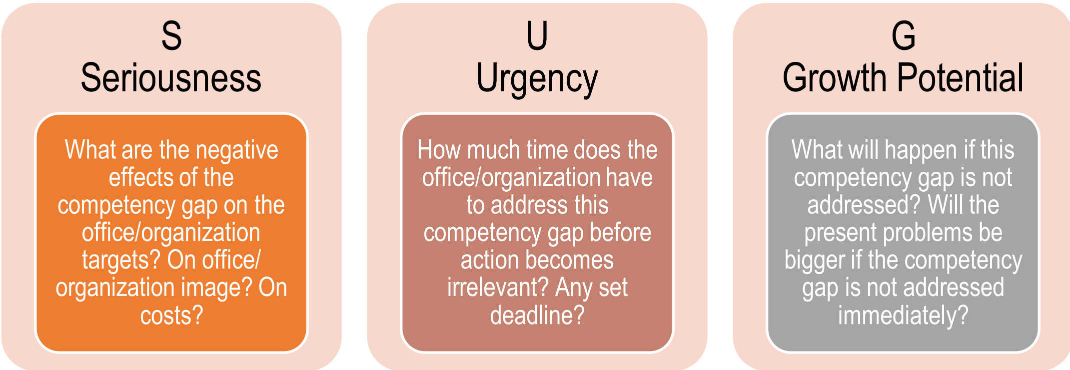


Figure 27. Criteria for Prioritizing Competency Gaps

Answering these questions for each competency gap facilitates the prioritization process. A sample Prioritization of Competency Gaps worksheet that uses a point system is provided in Annex 13.

7. Summarize findings

At this stage of the analysis process, the following information will have been harvested, and will guide the formulation of learning objectives, and the selection of appropriate LDIs:

- Priority competency gaps that affect critical areas of performance
- Profile of targeted individuals or groups, including:
  - Office they come from
  - Positions/roles
  - Group size
  - Age profile
  - Gender profile
  - Preferred language of instruction
  - Readiness for online learning
- Non-competency factors, though they cannot be addressed by LDIs, are conditions that affect learning and performance, and may include some of the following:

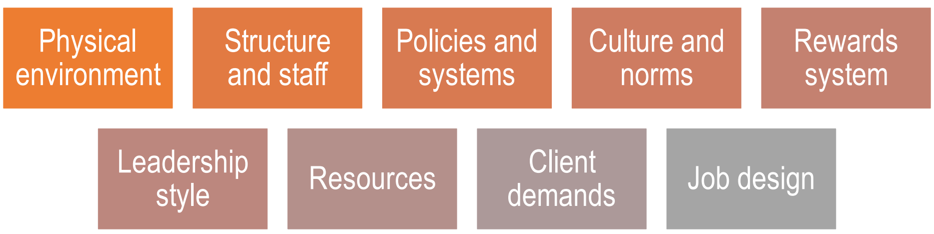


Figure 28. Non-competency Factors Affecting Learning and Performance

8. Generate recommendations

Formulate objectives. Having identified and prioritized competency gaps, two levels of objectives are defined: application objectives and terminal objectives (Figure 31).

Application Objective

- What critical behaviors need to be demonstrated in the workplace, and will lead to desired outcomes/results?
  - What should the learner be able to do when back on the job?

Terminal Objective

- What knowledge, skills, and attitudes do learners need to acquire or improve to perform the critical behaviors?
  - What should the learner be able to do by the end of the LDI, under what conditions, and to what standards or criteria?
  - What output/s are they expected to produce as a demonstration of the learning they acquired?

Figure 29. Application and Terminal Objectives

Application objectives describe how learners are expected to apply their learning to their job. These are the few critical behaviors which, if performed consistently on the job, will have the biggest impact on performance.

[Application objectives] need to pass what we call the "video test," which means that one can actually capture them on camera and be able to explain what is happening. One also needs to be able to count the number of times a particular behavior occurs, and even better, note the quality or accuracy of the performed behavior.

Adapted from Kirkpatrick, James D., Kirkpatrick, Wendy Kayser. (2016) Kirkpatrick's Four Levels of Training Evaluation. ATD Press: Alexandria, VA.

Application objectives need to be written clearly. They describe specific, observable behaviors so that these are easily recognizable when they are performed by learners in the workplace. Table 10 shows examples of poorly written and well-written critical behaviors.

Poorly written application objective	Well-written application objective
Teamwork	Conduct weekly team meetings with direct reports to document work status, acknowledge accomplishments, discuss issues that need action, and agree on next steps.
Use case management techniques	Apply the case management process to assess, plan, monitor, and evaluate services and possible options to meet the needs of assigned clients

Poorly written application objective	Well-written application objective
Conduct coaching of direct reports	Implement a complete cycle of coaching with each direct report, including developing a coaching plan, conducting coaching sessions, keeping a coaching journal, and evaluating the coaching activity
Design an LDI	Develop a design for a specific LDI according to design guidelines

Table 8. Writing Application Objectives

Terminal objectives, on the other hand, describe what learners will be able to do by the end of the LDI. They are directly related to the identified competencies for development, or the knowledge, skills, and attitudes they need to enhance to be able to demonstrate critical behaviors on the job. The focus is the learners' performance of a particular task or set of tasks. [29]

Terminal objectives have four building blocks:[30]

A Audience	• Who are the target learners of the LDI?
B Behavior	• What should learners be able to do by the end of the LDI?
C Condition	• What support (e.g., tools, information, equipment, policy, etc.) is needed so learners can successfully demonstrate the behavior?
D Degree	• How well should learners demonstrate the behavior? (e.g., timeliness, quality, quantity, etc.)

Following the A-B-C-D building blocks, an example of a terminal objective is as follows:

> By the end of the three-day Course on Designing Training Programs, Learning Specialists **(A)** will be able to design a training program **(B)** that addresses identified learning needs of MSWDOs on problem solving and decision-making **(C/D)**; and complies with a training design quality checklist **(D).**

Note that "addresses identified learning needs of MSWDOs on problem solving and decision-making (C/D)" indicates both a Condition (availability of needs analysis results) and Degree (i.e., addresses identified learning needs).

[29] Adapted from American Society for Training and Development (2008). Instructional Design and Implementation, in ASTD/Infoline: Tips, Tools and Intelligence for Trainers. Baltimore, Maryland: ASTD Press

[30] Adapted from American Society for Training and Development (2008). Instructional Design and Implementation, Volume 2 Training the Trainer. ASTD Press.

Below is an example of a set of application and terminal objectives.

Application Objective
Develop a design for a specific LDI according to design guidelines and quality checklist.

Terminal Objective
By the end of the three-day Course on Designing Training Programs, Learning Specialists will be able to design a training program that addresses identified learning needs of MSWDOs on problem solving and decision-making, and complies with a training design quality checklist.

Figure 30. Sample Application and Terminal Objective

Application and terminal objectives are the anchors in identifying the LDIs. Terminal objectives guide the selection of learning or instruction components of LDIs, while application objectives guide the workplace application components of LDIs. These objectives will be refined further during the Design phase.

Determine type of LDI. Having set application and terminal objectives, the next step is to determine appropriate LDI or combination of LDIs that will meet those objectives, and how the LDI/s will be delivered.

LDIs may be categorized intro three broad types: formal learning, relationship and discussion-based learning, and job-based learning.

Oftentimes, one LDI type is supplemented by another to achieve application and terminal objectives. For example, a training program which is considered as formal learning is supplemented by workplace coaching, a relationship and discussion-based approach; or coaching is done side-by-side with a special project, a type of job-based learning.

Tables 11 – 13 briefly describe features and examples of the broad categories of LDIs.[31] Annex 14 provides more details about specific LDI types in each category, including suggested number of learners per type.

Job-based Learning
Sometimes referred to as job-embedded learning, activities are integrated into learners' work practices; thus, learning happens right in the workplace. Job-based learning activities may be formal or informal. They may be carried out as distinct interventions to address specific competency gaps, or as follow-through or supplementary interventions to another LDI, e.g., formal classroom training.

[31] Adapted from Department of Education (2019). Learning and Development System Manual. Basic Education Sector Transformation Program, Australian Government Department of Foreign Affairs and Trade

Job-based Learning
Job-based learning activities are more effective when accompanied by coaching, as well as facilitated reflection and processing of learning. *In the 70-20-10 Learning Model, job-based learning activities create opportunities for workplace experiential learning (70%).*  Common types of Job-based LDIs: ➲ Committee Work ➲ Job expansion ➲ Job shadowing ➲ Job rotation ➲ Special projects ➲ Stretch assignments ➲ Informal job-based learning activities

Table 9. Job-based Learning L&D Interventions

Relationship and Discussion-based Learning
Also sometimes referred to as social or exposure learning, this provides opportunities for learners to interact with their supervisors, peers, and colleagues in the industry or profession. The conversations and interactions that happen become the springboard for learning. *In the 70-20-10 Learning Model, Relationship and discussion-based activities support social learning and interactions with people (20%).*  Common Types of Relations and Discussion-based LDIs: ➲ Coaching ➲ Mentoring ➲ Peer-assisted Learning (PAL) ➲ Communities of Practice (CoP)

Table 10. Relationship and Discussion-based L&D Interventions

Formal Learning
Refers to planned learning program composed of activities within a structured learning setting and includes instructor-led classroom, instructor-led online training, certification programs, workshops, and college courses. There is a curriculum and agenda, and objectives that are pursued within a pre-established timeframe.[32]  Common types of Formal Learning: ➲ Training programs ➲ Seminar ➲ Conferences ➲ Graduate and Post-graduate degree programs ➲ Knowledge Sharing Sessions (KSS) ➲ Benchmarking

Table 11. Formal Learning Interventions

[32] Adapted from: Association for Talent Development. Talent Development Glossary Terms. https://www.td.org/glossary-terms

Select L&D delivery modes. For a long time, face-to-face has been the most commonly used mode for delivering L&D interventions. However, with the launching of the worldwide web in the 1990s, as well as the changing conditions brought about by global developments (including the pandemic), organizations have been adopting alternative delivery modes that apply computer and internet-based technologies.

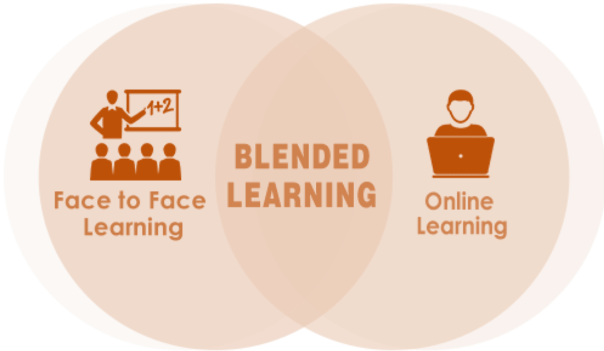


Figure 31. L&D Delivery Modes

A broad category of technology-enabled learning delivery mode is digital learning. It is an umbrella term that refers to any type of learning that uses digital technology. This includes learners taking learning programs online, but also includes learners doing internet research or watching online videos in a classroom, and as well as learning facilitators using digital tools like smart boards and tablets. Today, nearly any LDIs includes some type of digital learning.[33]

Another term that is now commonly heard and used is e-learning. Also called "virtual learning," e-learning generally refers to a program taken entirely over the internet. The learning facilitator and learners do not meet face to face. All course work and communication are handled via email, forums, chat, or video conferencing. Some institutions refer to this delivery mode as a "fully online" course.[34]

Following are the three types of delivery modes that more commonly used by organizations:

Face-to-face	Online Learning	Blended Learning
An instructional method where course content and learning material are taught in person to a group of learners. This allows for a live interaction between a learner and the learning facilitator. It is the most traditional type of learning instruction. Learners	This is another broad term, but slightly narrower than digital learning. It means that the majority of the coursework will be done through the internet — through forums, shared documents, email, chat, etc. However, it does not imply that there is no face-to-face interaction between students	Blended Learning is the practice of using several media in one curriculum. It refers to the combination of formal and informal learning events, such as classroom instruction, online resources, and on-the-job coaching.[36]

[33] Adapted from Digital Learning, E-Learning, Online Learning: What's the Difference? Digital Learning, E-Learning, Online Learning: What's the Difference? (cipcourses.com)
[34] Ibid.
[36] Association for Talent Development. Talent Development Glossary Terms. https://www.td.org/glossary-terms

Face-to-face	Online Learning	Blended Learning
benefit from a greater level of interaction with their fellow learners as well. Face-to-face learning ensures a better understanding and recollection of lesson content and gives learners a chance to bond with one another.[35]	and the teacher. It can include doing coursework in a classroom or at a distance, so long as communication is primarily online. Online learning can be a combination of real-time interactive sessions (synchronous), and self-managed activities without needing to be present in the virtual classroom (asynchronous).	

Table 12. LDI Delivery Modes

Annex 15 shows considerations in determining the appropriate LDI delivery modes.

Identify non-competency factors. Along with analyzing performance and competency gaps, the LNA process picks up information on the conditions that affect learning and performance. These are factors that cannot be addressed by LDIs but can affect the achievement of expected LDI results.

If LNA findings point to possible issues that can hinder the learning process or the transfer of learning to the job, these are concerns that need to be brought to the attention of concerned individuals or offices through the LNA Report so actions can be taken to minimize any adverse effects.

Likewise, factors that can support the LDI are part of the recommendations of the LNA, particularly support and accountability mechanisms for application of learning (Figure 34). These can be identified initially through the LNA process, and refined and made more specific during the Design and Implementation phases.

[35] https://tophat.com/glossary/f/face-to-face-learning/

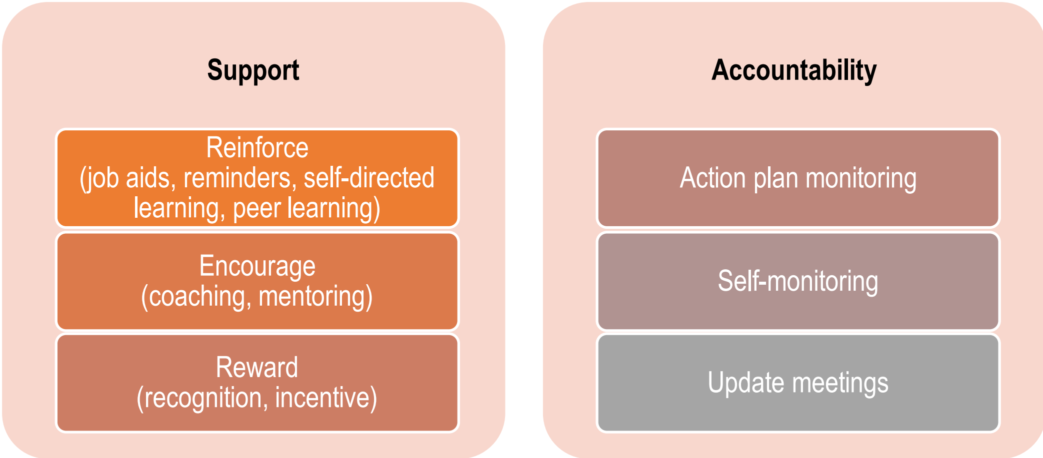
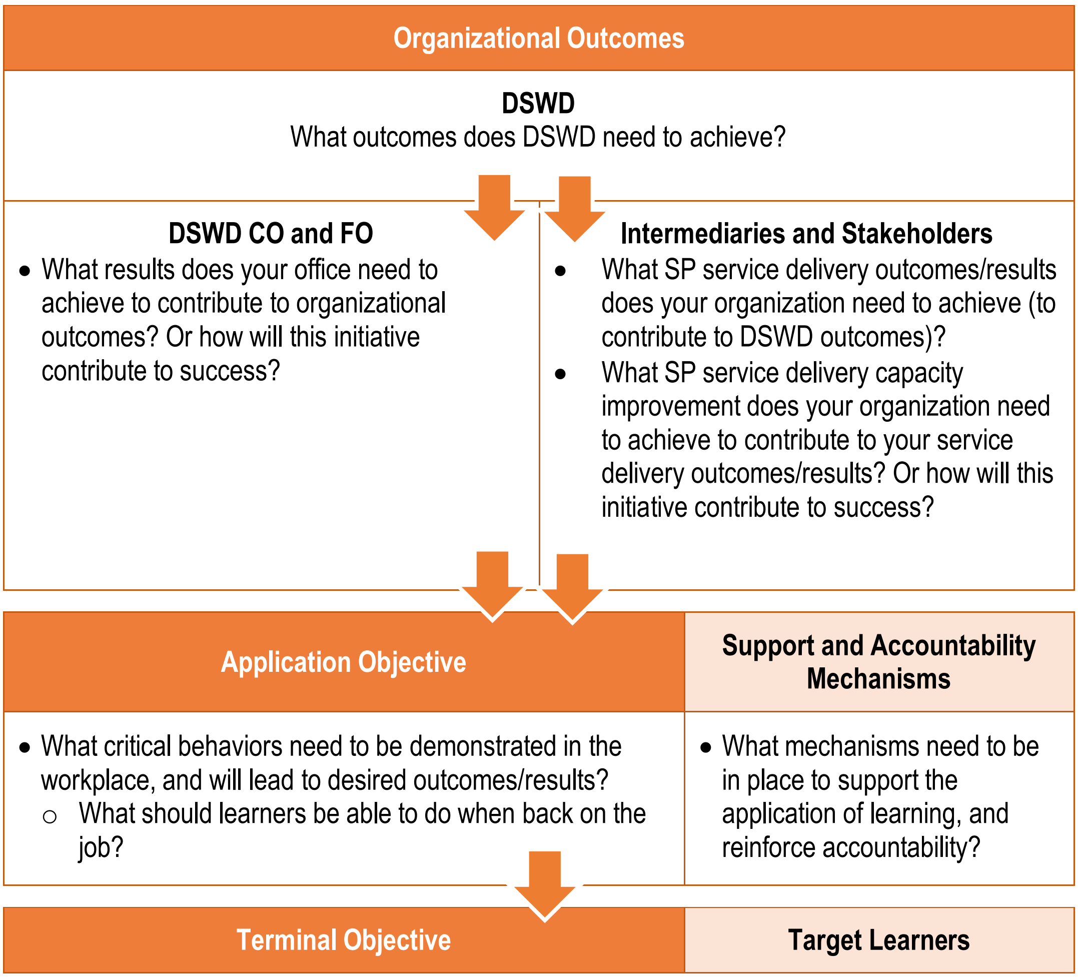


Figure 32. Support and Accountability Mechanisms[37]

Complete the Learning Results Chain. Summarize the answers to the key questions in the LNA is through the Learning Results Chain. This is a snapshot of the desired outcomes and objectives of the LDI, support and accountability mechanisms, and target learners.



[37] Kirkpatrick, James D.; Kirkpatrick, Wendy Kayser. (2016) Kirkpatrick's Four Levels of Training Evaluation. ATD Press: Alexandria, VA.

<table>
<tr><th>Terminal Objective</th><th>Target Learners</th></tr>
<tr><td>• What knowledge, skills, and attitudes do learners need to acquire or improve to perform the critical behaviors?
○ What should the learner be able to do by the end of the LDI, under what conditions, and to what standards or criteria?
○ What output/s are they expected to produce as a demonstration of the learning they acquired?</td><td rowspan="3">• Who are the target learners?
○ Office they come from
○ Positions/roles
○ Group size
○ Age profile
○ Gender profile
○ Preferred language of instruction
○ Readiness for online learning</td></tr>
<tr><th>Intervention</th></tr>
<tr><td>• What intervention is needed to address learning needs?</td></tr>
</table>

Figure 33. Learning Results Chain

9. Prepare LNA Report

The LNA report will capture all the information in the preceding steps. It has the following parts and guide questions:

Section	Guide Questions
Executive Summary	What are objectives, key findings, conclusions and recommendations of the LNA?
Background and Rationale	Why was the learning needs assessment (LNA) conducted?
Objectives of the LNA	What does this LNA hope to accomplish?
Methodology	How was data collected? Who were the data sources?
Limitations of the LNA	What factors related to the LNA design or methodology may have affected the results of the study, or influenced the interpretation of the findings?
Assessment Results	What were the results of the learning needs analysis? What do the findings indicate in terms of competency gaps among prospective learners?
Conclusions	What are the key findings of the learning needs analysis? What are the implications on subsequent ADDIE phases? What the objectives to address priority competency gaps? (Note: Include the Learning Results Chain here.)

Section	Guide Questions
Recommendations	Given key findings and the learning results chain, what is/are the proposed LDI/s that will address priority learning needs?
Appendices	What relevant information or documents support the LNA Report?

Table 13. Sections of the LNA Report

More guidance is provided in the annotated LNA Report template in Annex 16.

The Learning and Development Intervention Proposal

The LNA provides basis for a Learning and Development Intervention Proposal which is submitted for approval prior to providing an LDI. The information required in the preparation of the proposal are culled from the LNA Report as well as the LDI Design and Implementation Plan (LDI-DIP) which will be discussed in the next section. Table 16 shows parts of the proposal and sources of inputs from the LNA and LDI-DIP.

Please refer to Annex 17 for the Learning and Development Intervention Proposal template.

Components of the Proposal	Description/Detailed Information	
I. LDI INFORMATION		
PROPOSAL TITLE		
PROPOSED DATE AND VENUE		
PARTICIPANTS		
PROPONENT		
FUNDING REQUIREMENT		
FUNDING SOURCE		
II. RATIONALE		
Consider the following in writing the *Rationale* of the proposed activity: • proponent mandate • legal basis • Department-wide goal • current situation • results of the learning needs analysis (LNA) • purpose of the proposed activity *(or objectives in broad strokes)*		LNA: • Background and rationale of the LNA • Organizational Outcomes in the Learning Results Chain
III. OBJECTIVES General pointers in formulating learning objectives: • Learning objectives are learner-centric. These are written in the perspective of the learners. • It has to be specific, observable and measurable. When running out of action words or verbs to articulate a specific, observable and measurable objective, *Bloom's Taxonomy of Objectives* is a good reference. • It is a general rule that a learning objective shall consist of one learning outcome only.		
TERMINAL OBJECTIVE	This states the highest level of learning an individual will accomplish by completing the learning intervention. This follows a formula: **AUDIENCE/LEARNERS + BEHAVIOR (TASK) + CONDITION + DEGREE (STANDARD)**	LNA/LDI-DIP: Terminal Objective
ENABLING OBJECTIVES	This states the expectations of the learners' performance in smaller and more manageable objectives. This describes the process enabling the participants to achieve the expected highest level of learning as articulated in the *Terminal Objective*.	LDI-DIP: Enabling Objectives
IV. EXPECTED RESULTS	OUTPUT states the *what*. This refers to a deliverable attainable *during* the activity hence *directly attributed* to the LDI/CBA. Usually, an output is *tangible*. OUTCOME states the *expected changes in learners' behavior* or *improvement in performance when they apply their learning from the LDI back on the job*. The outcome is demonstrable and observable.	LDI-DIP: Output LNA: Application Objective
V. MEASURES TO ASSESS QUALITY OF THE ACTIVITY	Consider Kirkpatrick's Four-Level Evaluation Model then identify the activity or tool of measurement: Level 1 **REACTION** Level 3 **BEHAVIOR** Level 2 **LEARNING** Level 4 **RESULTS**	M&E Plan formulated in Design phase
VI. PARTICIPANTS	Do not be left off guard of the manageable number of participants depending on the type of learning and development intervention proposed. State relevant information or profile of the target learners.	LNA: Learners' Profile
VII. DESCRIPTION OF THE ACTIVITY	Briefly describe major methodologies to be used in the proposed activity as well as the initial sessions or topics to be discussed in order to achieve the objectives set. Provide a brief explanation as to how each will be executed. (attach LDI Design and Implementation Plan)	LDI-DIP
VIII. RESOURCE REQUIREMENTS	(Included in LDI-DIP)	
IX. RECOMMENDATION		
SUBMITTED BY:		
CERTIFIED AS TO AVAILABILITY OF FUNDS		
APPROVED/DISAPPROVED		

Table 14. Learning and Development Intervention Proposal and Information Sources

In summary:

- The Analysis phase is the cornerstone of the ADDIE. It provides basis for the design, development, implementation, and evaluation of an LDI to ensure that it is shaped and carried out to maximize the achievement of expected results from the LDI.
- An LNA ensures that an LDI is not limited to just the learners' acquisition of learning of terminal learning objectives, but more importantly it clarifies the expectations in terms of improved learner performance on the job and how this contributes to organizational performance. The Learning Results Chain provides summary of the expectations at different stages of the LDI and becomes the basis for M&E.
- It is crucial that the LNA is a collaboration between the LMT and the managers and supervisors who play a key role in defining expectations and ensuring that the LDI is linked to "business"/organizational goals.
- LNA makes LDIs evidence-based. It validates whether an LDI is the best solution by ascertaining that performance issues are due to competency development needs, rather than other factors.
- LNA is a structured process that is carefully planned. The LNA Plan is the blueprint that guides the conduct of the assessment.
- Proposed LDIs must be supported by an LNA. Formal, informal, or rapid appraisal methods may be used in the assessment, and mechanisms for validating data, analysis, conclusions, and recommendations are built into the process.
- While an LNA tries to isolate competency factors, it also needs to recognize other issues in the workplace that affect learning and performance. These non-competency factors are included in the LNA Report and brought to the attention of concerned individuals or offices. Issues need to be addressed especially if they will impinge on the success of the LDI.
- In the same way, factors that can support and reinforce workplace learning and performance are highlighted so these are optimized in LDI design, development, and implementation, and contribute to LDI success.
- The results of the LNA will guide recommendations on the mix of LDI types, i.e., formal learning, relationship-based learning, and job-embedded learning, that will best address priority competency needs. It will also help determine the appropriate delivery modes, i.e., face-to-face, online, or blended learning based on learning objectives and profile of target learners.

DESIGN

This section of the L&D Guidebook will cover:

- Purpose and value of the Design phase
- Scope and outputs of the Design phase
  - Finalizing/Formulating learning objectives
  - Identifying specific outputs
  - Determining scope of content and how to organize this
  - Selecting combination of delivery methodologies
  - Identifying Learning Service Providers
  - Identifying resource requirements
  - Preparing a detailed LDI Design and Implementation Plan
  - Drawing up M&E plan
- Key roles in the Design phase
- Design process, guidelines, and standards

Robert has been tasked by his boss to lead a team that will design a three-day course on Managing Change for Provincial Social Welfare Development Officers (PSWDOs). This has been identified as a priority LDI in the LNA.

He and his boss have carefully selected the team members. He is now meeting the team for the first time. He has barely taken his seat when one question after another was raised by the members.

VI. Design

The Design phase is carried out after the Analysis phase confirms there are competency gaps among job/role performers which can be reasonably addressed by L&D. It is considered as the heart of the ISD process.[38]

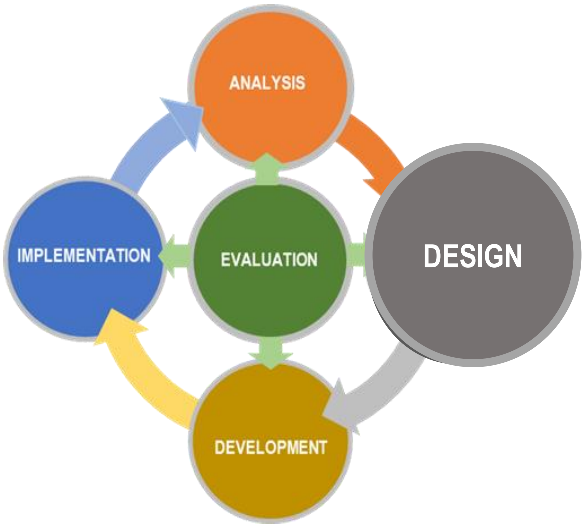


Figure 34. Design Phase

A. Purpose and value of the Design phase

The Design phase translates the results of the Analysis phase into actionable intervention/s to develop competencies critical to achieving performance objectives.

- It sets the foundation (i.e., learning objectives and evaluation strategy) of the intervention
- It builds the detailed structure (i.e., content, methodologies, pacing, and resource requirements) of the intervention

B. Scope and Outputs of the Design Phase

The Design phase weaves together key elements to produce a blueprint (i.e., detailed LDI Design and Implementation Plan) that will guide the execution of the next phases of the L&D Management Cycle. It covers:

- Finalizing/Formulating learning objectives (i.e., terminal, enabling, and session)
- Identifying specific outputs that will be produced as a result of the intervention
- Determining scope (breadth and depth) of content and most appropriate way to organize this
- Selecting combination of delivery methodologies that will best facilitate learning
- Identifying Learning Service Providers
- Identifying resource requirements (including learning and delivery resource materials) to support execution of the intervention

[38] American Society for Training and Development (2008). Train the Trainer Guide (Volume 2): Instructional Design and Implementation. Baltimore, Maryland: ASTD Press

➲ Preparing a detailed LDI Design and Implementation Plan (LDI-DIP)

➲ Drawing up a monitoring and evaluation plan

C. Key Role Players in the Design Phase

The Design phase involves highly iterative processes that need the engagement of several key players:

Key Player	Responsibilities
Learning Management Team (LMT) • Team Leader • Specialists with grounding on: ○ adult learning ○ methodologies ○ instructional design ○ M&E	▪ Spearheads the design process ▪ Ensures all needs analysis results are available as reference ▪ Reviews needs analysis results ▪ Prepares initial draft of the design (if process is not fully commissioned to external service providers) ▪ Consults with clients during the design process to ensure relevance of objectives and outputs, and to clarify client involvement in any pre- and post LDI implementation activities ▪ Collaborates with internal or external subject matter experts to finalize design ▪ Reviews and endorses final design to management for approval
Subject Matter Expert/s (External or Internal)	▪ Reviews needs analysis results ▪ Reviews draft LDI design prepared by LMT, if available ▪ Provides inputs to ensure all design elements are fully covered ▪ Collaborates with Learning Management Team in finalizing design
Client Organization	▪ Collaborates with LMT in ensuring responsiveness of design in addressing needs of individuals and work unit by providing feedback on design elements (e.g., statement of learning objectives, outputs to be produced, content, methodologies, and duration) ▪ Clarifies any pre-and post-LDI implementation involvement

Table 15. Key Roles in Design Phase

D. Design Process, Guidelines, and Standards

The steps involved in designing LDIs are the same regardless of types of LDIs (i.e., formal, discussion-based, or job-based) or delivery modes (i.e., face to face, blended, or learning). Nonetheless, minor tweaking may be necessary for specific types of LDIs. For example, designing discussion-based LDIs like coaching will have less focus on content, and more on the interaction process.[39]

[39] The Civil Service Commission has developed a Coaching Guidebook that can be used in designing and implementing coaching activities. This can be accessed at: https://archive.australiaawardsphilippines.org/partners/cpos-and-psps/civil-service-commission-1/2011-2012/HROD%20Plan/Prioritised%20HROD%20Interventions/intervention-2-leadership-training/uploaded-documents/misc_2/csc-coaching-gudie-oct-1-with-preface-etc.pdf

Since designing a full-blown training program requires a more rigorous approach and attention to all elements, the following design steps will be anchored on designing a full-blown formal LDI (e.g., training program), so that these can be used as reference when designing other LDI types.

The Design Process

The design process starts with reviewing the results of the learning needs analysis to ensure the focus on the identified competency gaps and target learner profile.
Steps 2-8 builds the foundation and structure of the design, leading to the preparation of a detailed implementation plan. The last two steps involve the development of an M&E Plan and planning of pre- and post- intervention activities.

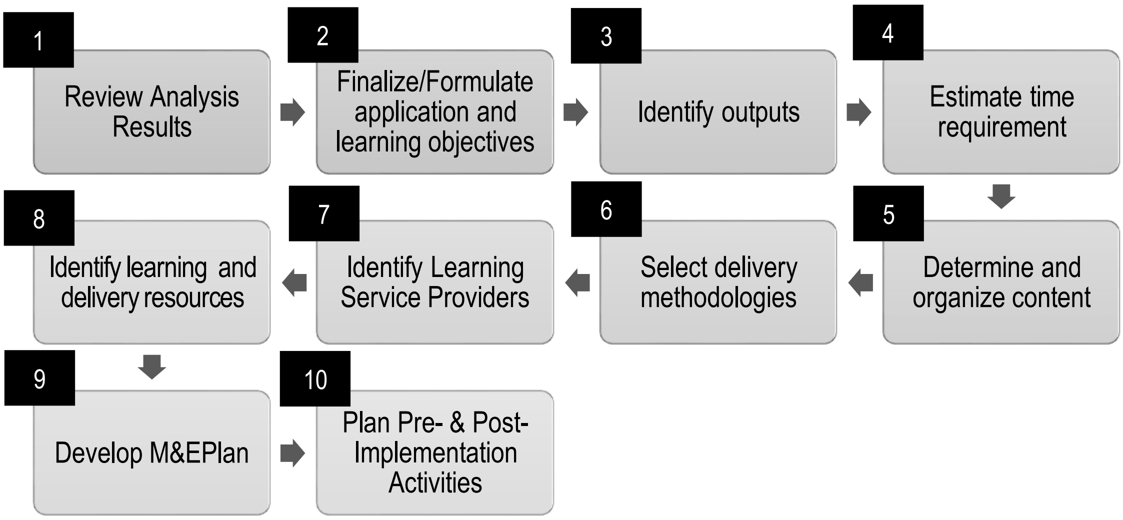


Figure 35. Key Steps in Design Phase

1. Review LNA Results

Revisiting the results of the Analysis phase will clarify the basis for designing the intervention, by answering the following questions:

1	What is the context of the LDI?
	▪ To what organizational performance area will the LDI contribute? ▪ What performance targets are expected to be positively affected by learning application? ▪ What processes/systems will be improved as a result of learning application? ▪ How are learners expected to apply their learning from the LDI? What critical behaviors need to be demonstrated in the workplace and lead to desired outcomes/results?
2	What competencies will be addressed (developed/improved) by the LDI?
	▪ What should target learners be able to do by the end of the LDI? ▪ What proficiency level is required? ▪ What specific behaviors will be the focus of the intervention? ▪ What outputs should learners be able to produce by the end of the intervention?
3	Who are the target learners?
	▪ From what organizations/offices do they come from? ▪ What are their positions/roles in the organization?

	▪ What is the group size? ▪ What is the age profile? ▪ What is the gender profile? ▪ What is the preferred language of instruction? ▪ Are there any cultural and disability considerations that should be addressed? ▪ What is their level of proficiency in using computers & familiarity with online-based tools?
4	**What is the most appropriate type of LDI to address learning needs?**
	▪ What kind of intervention is needed to address learning needs? ▪ What is the "best" LDI type and delivery mode to deliver instruction/facilitate learning?

2. Finalize/Formulate Application and Learning Objectives

The application objective that is identified during the Analysis phase informs the design process, especially the formulation of the learning objectives which are the most important building block of the LDI design. The objectives provide the anchor for fleshing out the substance and configuration of the design. They are also the basis for the conduct of learning evaluation (i.e., Level 2, which will be discussed in the Evaluation section of the guidebook).

➲ There are three levels of learning objectives: terminal, enabling, and session. The terminal objective is first identified in the Analysis phase and reviewed and finalized during the Design phase.

Terminal Objective	Defines overall learning objective of LDI Pins down what learners will be able to do by end of LDI under what conditions and according to what standards
Enabling Objective	Disaggregates terminal objective into manageable learning blocks Provides milestones in achieving terminal objective
Session Objective	Further breaks down enabling objective into smaller learning bites Describes what learners will be able to do right after a learning session

There is no hard and fast rule on how many terminal, enabling, and session objectives an LDI should address. The main determining factor will always be the competency and key behaviors that learners should be able to demonstrate by end of the intervention, as well as other practical considerations like learners' absorptive capacity and resource availability.

Following is a sample configuration of levels of learning objectives:

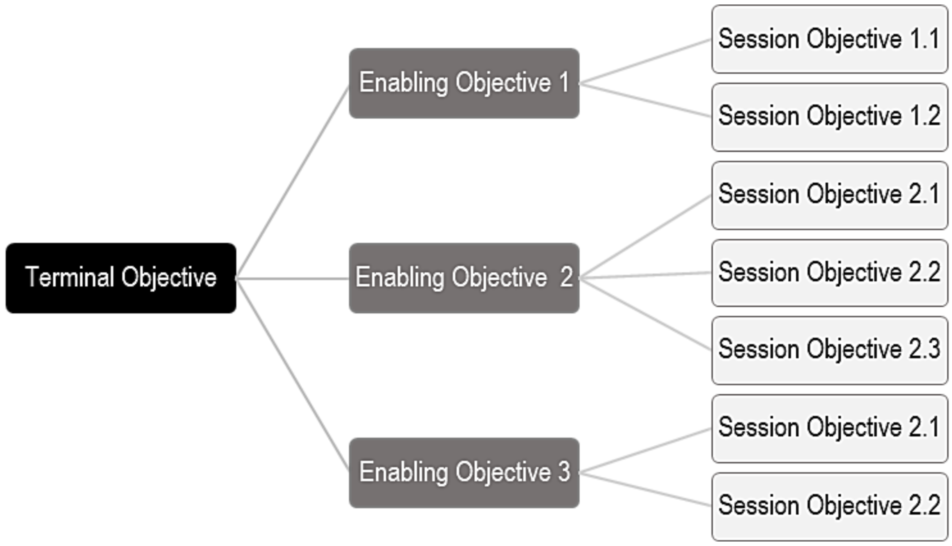


Figure 36. Sample Configuration of Levels of Learning Objectives

- Learning objectives, whether terminal, enabling, or session level, may address any or all of the following learning domains[40]:

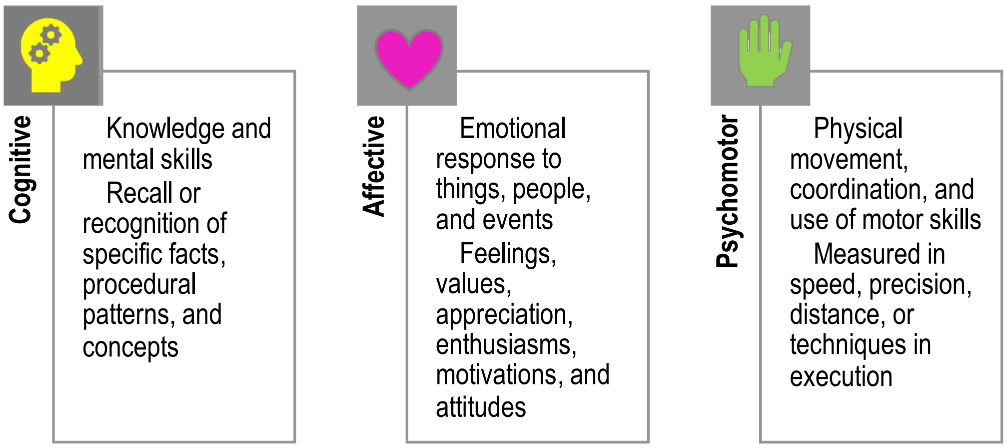


Figure 37. Learning Domains

The taxonomy of learning domains was developed in 1956 by a Committee of Educators (chaired by Dr. Benjamin Bloom). Further studies and modifications have been made on the taxonomy, but the cognitive, affective, and psychomotor domains are maintained. Each learning domain has several categories that reflect degree of difficulty and complexity of required behaviors to perform a task.

[40] Bloom's Taxonomy of Learning Domains, http://www.nwlink.com/~donclark/hrd/bloom.html

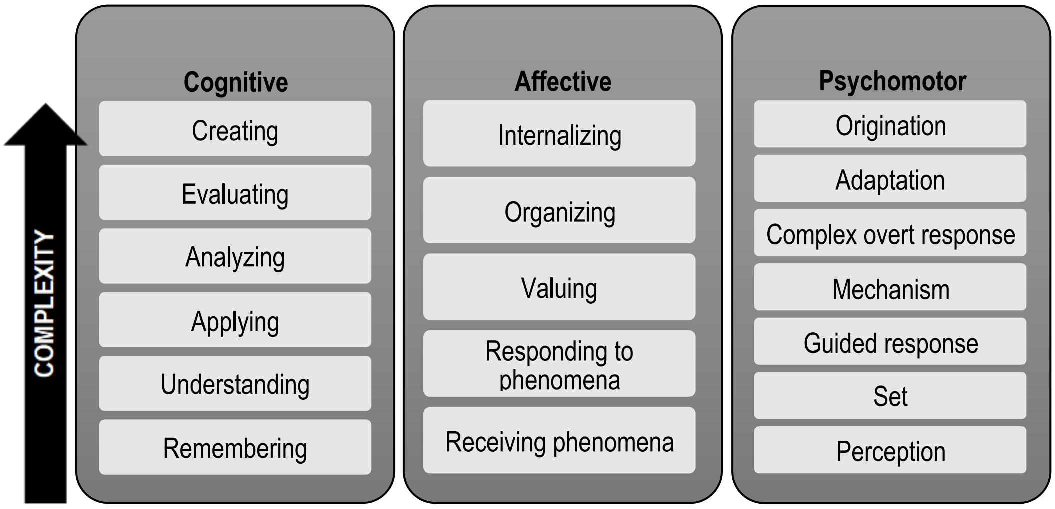


Figure 38. Blooms Taxonomy of Learning Domains and Categories

The complexity of required behavior to perform a task becomes the reference for formulating the learning objectives. For example, the objective statement for "remembering" would be different from "understanding" and "creating" (Figure 41):

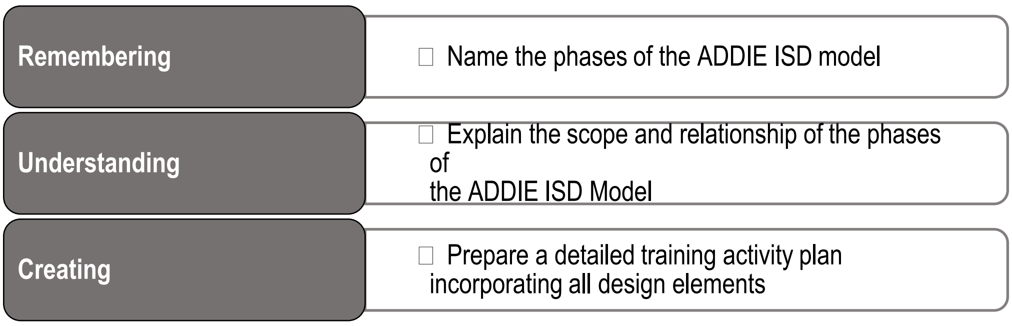


Figure 39. Sample Objective Statements based on Complexity of Required Behaviors

Please refer to Annex 18. Bloom's Taxonomy of Learning Domains for the different Cognitive, Affective, and Psychomotor categories and examples of each.

➲ Finalizing Terminal Objective/s

- Review application and terminal objectives identified in the Analysis phase and check for alignment and congruence.
- Finalize terminal objective statement to ensure that it will directly contribute towards achieving the application objective. (Refer to ABCD guideline discussed in the Analysis phase.)

In Table 18 , example (1) is not aligned to the application objective, while example (2) is not sufficient to support the application objective. Example (3) is a good statement of a terminal objective that is aligned with and supportive of an application objective.

Application Objective	Terminal Objective	
Develop training designs to address learning needs of LSWDOs covered by the Field Office	X	1. By the end of the LDI, Learning Specialists will be able to facilitate training programs for LSWDOs based on training design.
	X	2. By the end of the LDI, Learning Specialists will be able to develop training schedule containing topics, methodologies, and resource persons.
	✓	3. By the end of the LDI, Learning Specialists will be able to develop a training design of an assigned learning module based on identified learning needs of LSWDOs, following LDI design guidelines.

Table 16. Checking for Alignment of Application and Terminal Objectives (Example)

Planning for workplace learning application starts at the Analysis phase, with the identification of the application objective. The Design phase ensures that the LDI learning objectives are aligned with and supportive of the application objective. Workplace learning application is further reinforced in the following design tasks:

- ✓ Reviewing application objectives as basis for formulating learning objectives
- ✓ Identifying activities (during and after LDI conduct) that will support workplace learning application
- ✓ Embedding activities in the design that will allow learners to process learning and identify workplace application opportunities
- ✓ Dedicating a session for assisting learners in developing a Learning Application Plan (LAP)

➲ Writing Learning Objectives

- Frame objectives from the point of view of the learner, not the instructional designer, resource person or trainer
- Use verbs that clearly capture the desired behavior and level of complexity
- Use verbs that pass the "video test," i.e., demonstrable and observable behaviors
- Refrain from words or phrases that are vague and not observable. (Annex 18. Bloom's Taxonomy of Learning Domains, includes suggested action words to use when writing learning objectives.)

- Use these: Compare, Explain, Differentiate, Identify, Develop, Prepare, Conduct, Present, Apply, etc.
- Avoid these: Appreciate, Believe, Gain knowledge, Familiar with, Know, Learn, Perceive, Understand, etc.
- Follow the ABCD guideline in formulating terminal objectives. (Please refer to discussion in the Analysis phase.)
- Enabling and session objectives need not be formulated following the ABCD guideline but should clearly identify the behavior

Sample enabling objectives:

- Explain the value and purpose of a training design
- Formulate learning objectives
- Identify and organize key content areas using most appropriate structure
- Determine most appropriate learning methodologies in achieving learning objectives
- Identify resources needed to support execution of training program
- Consolidate design elements in a detailed training activity plan

Session objectives are "bite-sized" learning objectives and support the achievement of enabling objectives. They are the ones reflected in the detailed LDI-DIP table and serve as basis for identifying all other design elements (e.g., content, methodologies, etc.).

Sometimes, an enabling objective is small enough to be covered in a session and becomes the session objective. In the example above, enabling objective 1: *"Explain the value and purpose of a training design"* need not be broken down further into session objectives.

Below are sample session objectives that will support the achievement of an identified enabling objective:

Enabling Objective	Session Objectives
Formulate learning objectives	▪ Explain the value and purpose of learning objectives ▪ Differentiate the levels of learning objectives ▪ Differentiate the three learning domains ▪ Formulate terminal objectives following ABCD guideline ▪ Develop enabling and session objectives

Table 17. Sample Session Objectives

Having a set of well-stated learning objectives is good practice. It facilitates the remaining tasks in the design process and the development of Level 2 evaluation tools. Never outline topics or identify methodologies before formulating learning objectives. This is like “putting the cart before the horse”.

Always check if learning objectives will contribute towards needed knowledge, skills, and attitudes that will allow them to achieve the application objective back in the workplace.

3. Identify Outputs

Some LDIs are designed to equip learners with competencies to come up with a particular output by the end of the LDI or sessions. These are tangible products that also serve as evidence of acquisition of learning. These may be in the form of plans, proposals, designs, etc.

- A terminal output is captured in the terminal objective. While it is expected to be produced by the end of the LDI, parts of the output are usually developed by learners in separate sessions through a building block-approach.
- Session outputs can thus be “sub-outputs” contributing to the terminal output, or they can be standalone outputs. Sessions focusing on lower category of learning domains may not yield outputs.

Sample outputs:

Terminal output: Course Design on Problem Solving and Decision Making for MSWDOs	
Session Objectives	**Output**
▪ Explain the value and purpose of learning objectives	-none-
▪ Differentiate the levels of learning objectives	-none-
▪ Differentiate the three learning domains	-none-
▪ Formulate terminal objectives following ABCD guideline	▪ Statement of terminal objective for the course
▪ Develop enabling and session objectives	▪ Enabling objectives ▪ Session objectives

Table 18. Sample Outputs

4. Estimate Time Requirement

Indicative time needed to achieve each learning objective (considering the content and methodologies to be used) is initially determined. Although listed as the fourth key step in the design process, determining how much time is needed to achieve a session objective is highly iterative. It needs to be revisited and adjusted as the design takes form.

➲ The learning objectives and outputs to be produced by learners are major considerations when estimating time requirement.

- A session objective focusing on cognitive learning domain at the lowest category (Remembering) will need less time to achieve as it can be achieved in a short period time using a brief lecture or presentation.
- A session objective that targets the highest category of the domain (Creating) will require more time as learners will need to be guided on the process of crafting the output, aside from the conceptual inputs that will be provided.
- Session objectives focusing on psychomotor learning domain usually require more time to achieve, as learners need to apply and practice behaviors during the sessions.

➲ There are several other factors that need to be considered when estimating time requirement.

- Learners' current proficiency in target competency (e.g., novice or basic) and the expected level to be developed
- Output/s to be produced by learners during the sessions
- Breadth and depth of content needed to achieve the learning objectives
- Mix of delivery methods that will best facilitate learning (e.g., using a structured learning event or workshop activity will need more time compared to a straightforward lecture-presentation)
- Delivery platform and technologies that will be used (e.g., planned learner interactivity and collaboration during online sessions)
- Other implementation concerns (e.g., available budget, how much time learners can dedicate to attending learning sessions especially when they hold critical positions in the organization, etc.)

The rule of thumb for online (synchronous) sessions is to keep it short enough so that learners do not get bored and fall into a slumber or log in to their social media accounts. However, it should also be long enough to cover the essential learning points.

Backed up by psychological research, experts agree that the ideal length of an online learning session should be 15-30 minutes. Others suggest that it can be extended up to learning chunks of 90 minutes.

Adapted from: Winstead, S. "What's the optimal length of an e-learning course?" https://myelearningworld.com/whats-the-optimal-length-of-an-e-learning-course/

➲ Following are some tips in estimating time requirement.

- For face-to face delivery, divide each day into four, using coffee and lunch breaks as convenient session pauses. If working on an eight-hour day, each session will be approximately one hour and 45 minutes, with 20-30 minutes coffee break in the morning and another in the afternoon, and one hour lunch break. This chunking of learning session time will help manage learners' attention span, which tends to diminish after 20 minutes[41].
- For blended delivery, estimate which session objectives are best achieved through:
    - face-to face learning sessions;
    - online asynchronous or synchronous learning sessions;
    - on-the-job coaching, or other interventions
- For synchronous online learning sessions, endeavor to divide learning sessions into shorter blocks of 20-30 minutes for presentations. (Plan a variety of interactive elements for learning sessions beyond 30 minutes.)
- For asynchronous learning activities, provide sufficient time for learners to access, study, and develop any required outputs for submission.
- Allocate time for orienting learners and learning service providers on technologies to be used, if needed
- Estimate how much time is needed to achieve each session objective and plot it using an LDI Implementation Plan template (please see below).
- Review and adjust time allocation as content and delivery methods are identified.

[41] Course Duration and Its Impact on Learner Attention Span. https://blog.gutenberg-technology.com/en/course-duration-and-its-impact-on-learner-attention-span

Asynchronous *Time-independent* *Learning can take place at any time*	**Synchronous** *Takes place in real time* *Learners are present at the same time*
▪ Supports learning relationship among learners and with learning facilitators even when people are not online at the same time ▪ Learners can log in to an online learning environment at any time and download documents or send messages to facilitators or peers ▪ Provides learners more time for producing more thoughtful outputs ▪ Commonly facilitated by media such as e-mail, discussion boards, webcasts, blogs, etc.	▪ Supports learners in the development of more social learning communities by being in a virtual environment at the same time ▪ Interactions are real-time and allow for immediate discussion and resolution of any learning issues ▪ Promotes a sense of being an active rather than an isolated participant among learners ▪ Commonly facilitated by media such as video- and audio conferencing, live webcasts, chats, and collaborative applications

Figure 40. Asynchronous and Synchronous Learning

Asynchronous online learning promotes *Cognitive Participation* (increased reflection and ability to process information), while synchronous learning better supports *Personal Participation* (increased interest, motivation, and convergence on meaning).

Asynchronous ⟷ Synchronous
Cognitive Participation — ***Personal Participation***

Annex 19. Balancing the Synchronous and Asynchronous Parts of Your Course, contains some tips in in determining which learning sessions and materials should be asynchronous or synchronous.

➲ LDI Design and Implementation Plan Template

Below is an LDI Design and Implementation Plan (LDI DIP) template that can be filled up as the steps in the design process are carried out. At the end of the design process, this template should be completely filled up.

Day/ Time	Session Objectives	Output/s	Content	Methodologies	Learning Service Providers	Resources
What time will session start and end?	*What will learners be able to do by the end of the session?*	*What output will learners produce by the end of the session?*	*What topics will be covered to achieve session objective?*	*How will sessions be delivered? Cite specific activities, learning apps, etc.*	*Who will deliver/ facilitate the session?*	*What specific learning & delivery materials, supplies, equipment, etc. are needed?*

Please refer to Annex 20 for full page LDI-DIP template.

5. Identify and Organize Content

The content of each learning session will depend on what learners need to know to achieve the session objective. Depending on the session objective, content areas can be facts, concepts, principles, processes, or procedures. These content areas provide learners with essential knowledge that will support demonstration of behaviors or application of skills.

➲ Prioritizing Content

One challenge facing LDI designers is identifying the scope (i.e., breadth and depth) of coverage, and prioritizing what materials to include in the learning sessions. It can be tempting to adopt a shotgun approach and load as much as possible in the hope that it might contribute to learning. However, this practice will take away focus from the essential content and unnecessarily overwhelm the learners.

The basis for prioritizing content is always the session objective. Assess content against the following:

If material...	Then...
Is absolutely essential to learner's successful achievement of learning objective (i.e., learning objective cannot be achieved without it)	▪ It is a vital and a "must know" content area ▪ Include as high priority input
Will contribute substantially to learner's successful achievement of learning objective	▪ It is important and a "need to know" item ▪ Include after all vital items are covered
Is not essential to learner's successful achievement of learning objective (i.e., learning objective can be achieved without it)	▪ It is a "nice-to-know" item ▪ Include only after all vital and important items are covered and there is time
Has no significant contribution to learner's successful achievement of learning objective	▪ Is superfluous ▪ Do not include even if there is time

Table 19. Prioritizing Content

➲ Organizing Content

Organizing content materials of an LDI is essential in supporting acquisition of learning. This task involves 1) determining the sequence or order in which content will be delivered, and 2) arranging or structuring the relationship of materials.

➲ Sequencing content

- Materials can be sequenced by job demand; i.e., content areas required for immediate use are learned first before those that are required for later use.
- Materials can also be sequenced by progression:
  - Problem to solution
  - Specific to general
  - General to specific
  - Concrete to abstract
  - Practical to theoretical
  - Simple to complex
  - Past to present to future
  - Knowledge to application
  - Familiar to unfamiliar
  - Easier to more difficult

➲ Structuring Content

There are three ways to structure materials:[42]

Task-centered	Arranges materials by their relationship to job tasks Appropriate when there is a specific order in which tasks must be done
Topic-centered	Arranges related topics in blocks Helpful when learners need to learn a lot of information
Problem-centered	Structures materials around problems learners encounter on the job Suitable when learners need to learn how to solve problems

In most instances, all three structures are used in one LDI. Content can be first structured according to major topics, and then task-centered and/or problem-centered can be applied if appropriate. The learning objectives will guide content structuring.

6. Select delivery methodologies

There is no best delivery methodology (also referred to as instructional method), but there is an appropriate methodology. The goal in selecting delivery methodologies is to find the most appropriate combination that will promote acquisition of learning and support the achievement of learning objectives. Methodologies should also support the adult learning principles and conditions that facilitate learning.

[42] American Society for Training and Development (2008). Instructional Design and Implementation In ASTD/Infoline: Tips, Tools and Intelligence for Trainers. Baltimore, Maryland: ASTD Press

➲ Factors to consider in selecting delivery methodologies

Learning Objectives	• Target learning domain/s (i.e., cognitive, affective or psychomotor) and required level of complexity
Learners' Profile	• Group size, learning preferences, level of expertise on content, computer proficiency, etc
Technology	• Infrastructure and connectivity (including bandwidth limitations
●Time	• Estimated time needed to deliver any input and/or administer activities
Resources	• Required expertise and cost of developing learning and delivery support materials

➲ Categories of delivery methodologies

There are two broad categories of methodologies that apply to face-to-face, online, or blended learning.

	Inductive	Deductive
Features	▪ Promotes discovery or inquiry learning ▪ Allows learners to acquire learning by going through the experiential learning stages ▪ Supports high learner engagement ▪ Acknowledges and draws from learners' knowledge and experiences	▪ Provides learners direct instruction on accepted principles and generalizations then allows them to draw possible applications ▪ Allows limited learner engagement ▪ Highly dependent on expertise of subject matter expert/ learning facilitator
Learning Facilitator's Role	▪ Creates opportunities for learners to be exposed to concrete experiences, process these, draw conclusions, and apply learning (or identify possible applications)	▪ Assembles and presents information, concepts and principles, and then provides examples or illustrations ▪ May provide learners with tasks for application
Sample Methodologies	▪ Structured learning exercise ▪ Simulation ▪ Gamified activity ▪ Role play	▪ Lecture ▪ Presentation ▪ Demonstration ▪ Panel Discussion
Application concerns	▪ Learner-centered; needed time depends on complexity of activity and learners' responses	▪ SME-centered so easier to determine how much time for delivery

	Inductive	Deductive
	▪ Requires development of other learning resources (e.g., cases and scenarios, etc.)	▪ Minimal resources (e.g., laptop and projector, internet connection) are needed

Table 20. Inductive and Deductive Methodologies

Methodologies are not the same as learning tools or aids, which are used to support the execution of a methodology. For example, online collaboration tools like *Jamboard, Miro, Mentimeter,* etc. are not methodologies, but tools that are identified and prepared during the Development phase. These tools can be used to support methodologies like Brainstorming, Idea Generation, etc.

Please refer to Annex 21. Common Delivery Methodologies (with description and appropriate applications).

7. Identify Learning Service Providers

Part of the design process is identifying who will deliver or facilitate each of the learning sessions. These could be internal or external learning service providers.

- Resource person
- Subject matter expert
- Learning facilitator
- Coach

A detailed discussion of roles and responsibilities will be covered in the Implementation section of the guidebook.

8. Identify learning and delivery materials and other resources

This step in the design process involves identifying all the resources that will support achievement of each learning session. These include the learning and delivery materials, technology and connectivity, equipment, supplies, etc. Resource requirements will vary depending on LDI type and delivery mode.

Following are common materials and resources needed to support implementation.

- ➲ Learning and delivery resources

  Learner materials

  - ✓ Handouts and reference materials
  - ✓ Manuals or tool kits
  - ✓ Activity materials (e.g., case studies, structured learning exercises, etc.)
  - ✓ Learning journal or diary
  - ✓ Job aids such as worksheets, templates, checklists, infographics, etc. that will support learning during LDI conduct and learning application in the workplace

  Delivery materials

  - ✓ Facilitator’s session guide and related references
  - ✓ Presentation materials
  - ✓ Multi-media materials
  - ✓ Activity materials
  - ✓ Monitoring and evaluation tools

- ➲ Equipment

  - ✓ Laptop
  - ✓ Projector and screen
  - ✓ Sound system
  - ✓ Whiteboards and easel stand

- ➲ Supplies

- ➲ Technology and Internet connectivity

9. Develop M&E Plan

Monitoring and evaluation of LDIs starts at the Analysis phase when the desired outcomes are identified. The M&E strategy and plan is developed at the Design phase, especially since certain evaluation elements need to be embedded in the design.

An M&E Plan captures the following information:

- ➲ Objectives at each level of evaluation
- ➲ Indicators
- ➲ Methods and tools
- ➲ Data sources
- ➲ Schedule
- ➲ Person/s responsible

There will be a more detailed discussion of M&E and the development of M&E plan in the section on Evaluation of this guidebook.

10. Plan Pre- and Post- Implementation Activities

Part of designing a holistic learning experience is paying attention to what are needed to prepare the learning environment. (These are on top of administrative arrangements and logistics which need to be in place. These will be discussed in detail in the section on Implementation.) Also important is planning mechanisms and activities to facilitate and support learning transfer to the workplace. Some essential activities include:

Pre-Implementation	Post-Implementation
▪ Communicating objectives and scope of LDI to learners and their immediate supervisors ▪ Preparing learners on use of technologies that will be employed during LDI implementation ▪ Engaging supervisors in validating application objective and determining opportunities for immediate application of learning	▪ Engaging learners and supervisors in: • reviewing and finalizing learning application plans • identifying job-based interventions (e.g., coaching) that can support learning transfer and further development of learners' competencies ▪ Partnering with learners and supervisors in monitoring and evaluating workplace learning application

Table 21. Pre- and Post-Implementation Activities

Supplementary Notes on the Design Phase

1. Embedding Evaluation in the LDI Design

➲ Weave into the design formative mechanisms and activities that will be carried out to:

- gather learners' feedback on LDI implementation (Level 1 – Reaction level)
- check on and facilitate learning journey (Level 2 – Learning level)

➲ Allocate time for any summative evaluation activities that will be undertaken, including administration of post-program evaluation form and pre- and post-tests

➲ Allocate time for preparation of learning action plan.

(Evaluation mechanisms and tools will be further discussed in the section on Evaluation.)

2. Crafting an Inclusive LDI Design

The design of any LDI should provide all individuals with equal opportunities to learn, regardless of ability or disability, age, gender, or cultural, and linguistic background. The Universal Design for Learning (UDL) framework provides three design principles related to this:[43]

[43] Fact Sheet: Universal Design for Learning. https://lincs.ed.gov/state-resources/federal-initiatives/teal/guide/udl (Accessed 8 October 2021)

- ➲ Multiple means of representation – using a variety of methods to present information and providing a range of means to support learning
- ➲ Multiple means of action and expression – providing learners with alternative ways to act skillfully and demonstrate what they know
- ➲ Multiple means of engagement – offering choices of content and tools and adjustable levels of challenge to motivate and tap into learners' interests

3. Aligning DSWD-SWIDB Design processes with the Professional Regulation Commission's Continuing Professional Development (PRC-CPD) Requirements

- ➲ LDIs developed for DSWD Social Protection staff and partners may be submitted to the PRC for accreditation as a CPD Program. PRC recognizes the following types of LDIs for this purpose:[44]
  - Formal learning
  - Non-formal learning
  - Informal earning
  - Self-directed learning
  - Online learning activities
  - Professional work experience
  - Attendance to conventions and conferences sponsored by accredited professional organizations
- ➲ LDI design elements prepared according to processes contained in this section can readily be used as source materials for complying with PRC-CPD program accreditation design requirements:

PRC Requirements	DSWD-SWIDB Design Elements
▪ Course objectives stating competencies to be gained from the program	▪ Terminal objective/s ▪ Enabling objective/s
▪ Instructional design (as prescribed by relevant board) ▪ Program of activities (showing tome/duration of topics/workshop and resource persons with position and office, and evaluation period)	▪ Design with detailed LDI Implementation Plan ▪ M&E Plan
▪ Evaluation tool specific to course objectives set	▪ M&E Plan ▪ Level 2 (Learning) and Level 3 (Behavior) evaluation tools

Table 22. Alignment of CPD Program Accreditation Requirements with SWIDB Design Elements

[44] Professional Regulation Commission (2017). PRC Resolution No. 1032, s. 2017, Implementing Rules and Regulations of Republic Act No. 10912, known as the "Continuing Professional Development Act of 2016. http://www.prc.gov.ph/sites/default/files/CPD_IRR_p.pdf

Table 25 shows how the DSWD-SWIDB design elements using the LDI DIP can be "migrated" to the CPD Instructional Design template.

Specific Objectives of the Program	Learning Outcomes per Topic	Topics to be Discussed/ Resource Person	Time Allotment for Each Topic	Teaching Methods and Aids for Each Topic	Evaluation Method to be Used to Measure the Program Objectives
CPD Instructional Design Template Elements					
DSWD-SWIDB LDI DIP Elements					
Terminal and enabling objectives	Session objectives	Topics/ content highlights	Number of minutes (or hours) from the "Time" column	Methodologies and learning resource materials	M&E strategies from the M&E Plan

Table 23. Migrating Design Elements from LDI-DIP to CPD Template

4. Doing a final quality check of LDI design

   The final output (LDI Design and Implementation Plan) must be reviewed by the design team using three lenses: that of the learner, the learning service provider, and the designer.

   Annex 22 - LDI Design Quality Check contains a set of items that can guide the design team in reviewing the final output.

In summary:

- ✪ The Design phase is the heart of ADDIE. It translates the results of the Analysis phase into actionable LDIs to address learnings needs, and in the process build competencies that will contribute to improved performance.
- ✪ It is a highly iterative process that requires the engagement of specialists with grounding in instructional design, adult learning, and delivery methodologies, and subject matter experts.
- ✪ It starts with reviewing and finalizing the application and terminal learning objectives that are identified in the Analysis phase, and formulating the enabling and session learning objectives.
- ✪ The learning objectives are the most important building block of the LDI design as they inform the outputs, content, methodologies, resources, learning service providers, and time requirement. It is therefore critical that learning objectives are well-formulated and checked.
- ✪ The learning objectives likewise become the basis for evaluating the LDI. An M&E plan is developed as part of the design process, especially since formative evaluation mechanisms need to be embedded in the design.
- ✪ A series of decisions need to be made by the design team as the design process progresses. These include what essential topics should be covered, most appropriate delivery methodologies to use, how much time to allot, etc.
- ✪ The different design elements are captured in the LDI-DIP. The LDI-DIP guides the development of delivery and learning materials and M&E tools, and serves as the blueprint in implementing the LDI.

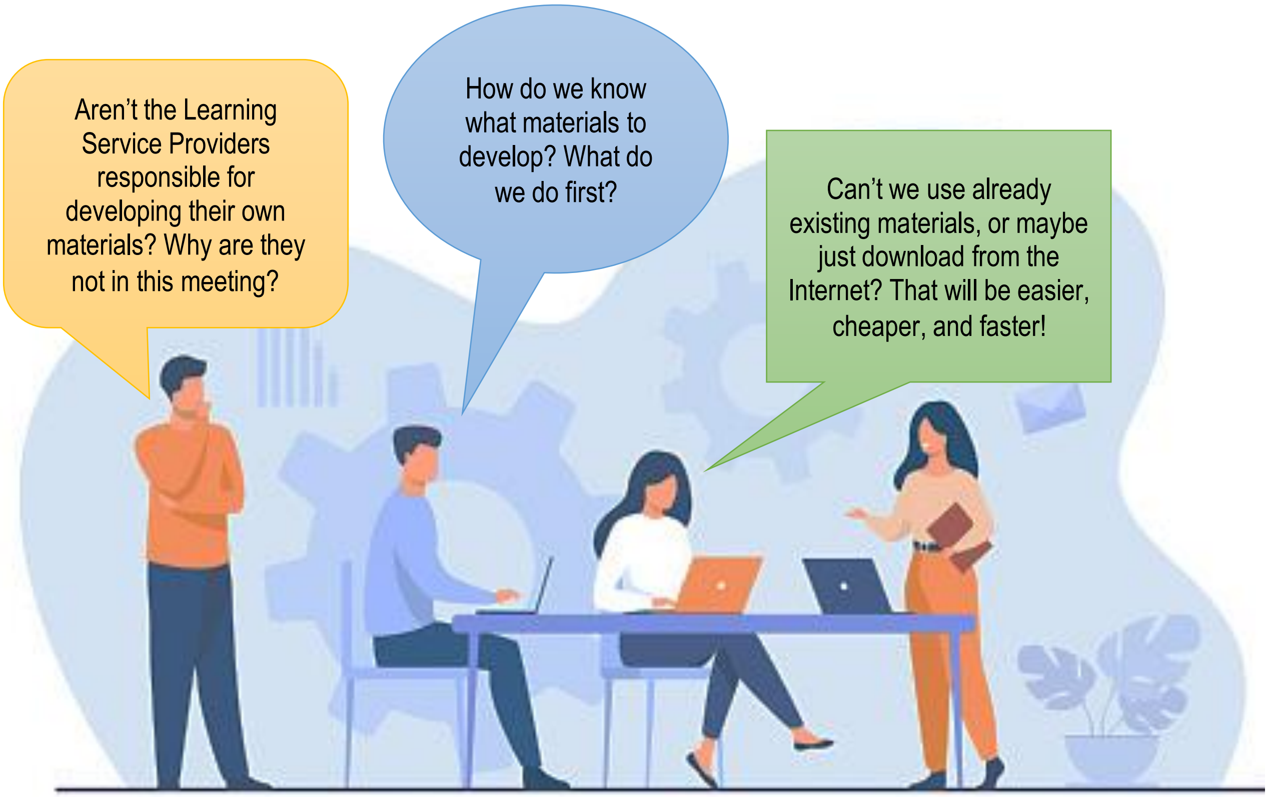
DEVELOPMENT PHASE

This section of the L&D Guidebook will cover:

- Purpose and value of the Development phase
- Scope and outputs of the Development phase
    - Reviewing design, learner profile, and resource
    - Developing content
    - Determining types of materials to be developed
    - Developing learner materials
    - Developing delivery materials
    - Developing evaluation tools
    - Pilot-testing materials
    - Finalizing materials
- Key roles in the Development phase
- Development process, guidelines, and standards

Anna was part of the team that designed the Course on Managing Change for PSWDOs. Her boss has approved the design, and assigned her now to lead the development of all the learning resource materials that will be used in implementing the LDI.

In preparation for the task ahead, Anna is meeting with the team to discuss what is expected of them and to solicit questions that members have on the assignment. She also intends to share with them the process that the team will adopt to produce the outputs.



VII. Development

The Development phase is informed by the LDI design, the M&E plan, as well as the learners' profile identified in the Analysis phase.

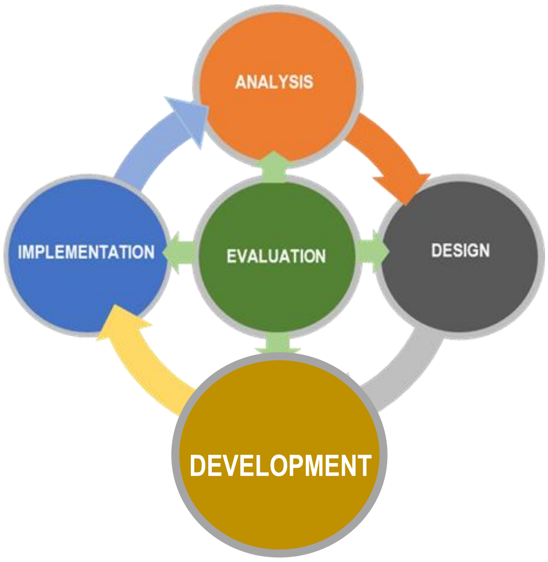


Figure 41. Development Phase

A. Purpose and Value of the Development Phase

The Development phase provides processes for identifying, conceptualizing, producing, and evaluating learning resource materials that will support LDI delivery and facilitate learning.

All forms of learning are linked to learners' interactions with the self (through reflection), with other people (learning service providers and co-learners), the content, and learning resources.

Well-conceptualized and developed delivery and learning materials are tools for:

- Presenting information
- Clarifying and expanding concepts
- Modeling tasks or behaviors
- Gaining and holding learners' interest
- Encouraging engagement
- Improving retention
- Aiding learning application during and after the conduct of the LDI

B. Scope and Outputs of the Development Phase

The development phase involves three components:

Component	Outputs
Developing content	▪ Specific content and text of topics
Determining types of materials to be developed	▪ Checklist of materials for development
Developing materials **(Including courseware development for e-learning)**	▪ Learning materials ▪ Delivery materials ▪ Evaluation tools

Component	Outputs
Developing evaluation tools	▪ Monitoring templates

Table 24. Scope and Outputs of Development Phase

C. Key Role Players in the Development Phase

Key Player	Responsibilities
Learning Management Team (LMT) • Team Leader • Specialists with grounding on: ○ adult learning ○ development of learning and delivery materials ○ M&E • Graphic, Digital arts or Multimedia specialist	▪ Spearheads the development process ▪ Ensures that LDI design and learner profile are available as reference ▪ Reviews design, learner profile, and available resources ▪ Collaborates with internal or external SMEs and IT Specialist in developing all materials ▪ Conduct pilot-testing of materials ▪ Reviews and endorses final materials to management for approval
Subject Matter Expert/s (External or Internal)	▪ Reviews design and learner profile ▪ Undertakes content development ▪ Develops learning materials and delivery materials ▪ Collaborates with LMT and IT Specialist in developing media (e.g., audio, video, animations) and other interactive elements Collaborates with LMT and IT Specialist in finalizing all materials
IT Specialist (For online learning)	▪ Collaborates with LMT and SME in identifying most appropriate programming or authoring tools ▪ Collaborates with LMT and SMEs in developing interactive online learning content and materials

D. Development Process, Guidelines, and Standards

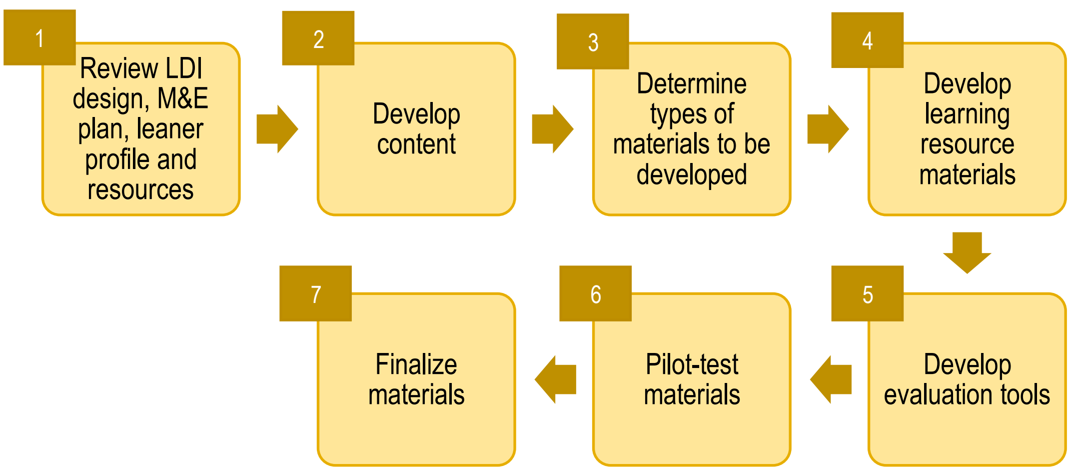


Figure 42. Key Steps of the Development Phase

Figure 44 shows the key steps in the Development phase, which apply to developing materials regardless of LDI types and delivery modes. Online and blended learning activities will involve the development of materials in digital formats (or conversion of existing materials into digital formats) for sharing and distribution over the Internet.

Although presented as a sequential process, these steps, just like in the Design phase are highly iterative. The steps on developing learner materials, delivery materials, and evaluation tools are oftentimes done simultaneously and collaboratively by members of a team.

1. **Review LDI design, M&E plan, learner profile, and available resources (including budget and technology)**
   - Revisit terminal and session objectives. Review the learning domains and level of complexity of required behavior/s.
   - For blended learning, note which sessions will be delivered synchronously and which will be done asynchronously.
   - Review content highlights and methodologies that will be used in each session.
   - Note evaluation mechanisms embedded in the design and tools indicated in the M&E plan.
   - Study learner profile; check for specific diversities (e.g., learners with hearing or other disabilities, etc.) and learning preferences that need to be addressed.
   - Check available resources needed to support development (e.g., people, cost, technology, connectivity, etc.).

2. **Develop content**
   - Flesh out topics per session objective by collecting materials and preparing text of lecture/presentation (to include facts, principles, procedures, etc.).
   - Include examples or cases that will be cited.
   - Review planned activities; note down activity instructions and processing questions.

3. **Determine types of materials to be developed**
   - Using the methodologies identified in the design and the developed content, identify materials that will best support delivery or transmission of content (e.g., video clip, presentation slides, reading references, etc.).

     Be as specific as possible (e.g., video clip on using ORID as a reflection tool; presentation slides on: Overview of Kirkpatrick Model; Data sources; Evaluation Methodologies and tools; etc.).
   - Determine what materials learners will need to facilitate acquisition of learning based on what is delivered (e.g., ORID worksheet; sample Level 1 Evaluation tool; sample Level 2 Evaluation tool; etc.).

- List formative evaluation tools and materials that will support administration/facilitation of formative evaluation mechanisms embedded in the design (e.g., questions for quiz using *Kahoot*[45]; debriefing worksheet; etc.).
- List summative evaluation tools that will be prepared (e.g., post-program evaluation form; pre- and post-program knowledge test; etc.).
- Identify workplace application tools and job aids that will be provided to learners to facilitate transfer of learning back on the job.
- Prepare a checklist or matrix of all materials to be developed for the LMT's reference; modify and build on the list as the Development process progresses.
- For blended learning, mark which materials are needed for synchronous and asynchronous sessions.

Session	Content Highlights	Activity/ Methodology	Learner Materials	Delivery Materials	Evaluation tools	Workplace Application Tools
DAY 1						
Session 1: Preparing the Learning Environment	Course overview: Objectives, Content, Schedule	Unfreezing Activity Presentation Test administration	Handout or e-copy: Course objectives and schedule	Presentation slides ▪ Activity instructions ▪ Course overview	Pre-program Knowledge Test	-
Session 2						

Table 25. Sample Matrix of Materials for Development

The process of determining types of materials to be developed is best done in a collaborative manner by a team that understands the LDI design. A well-prepared LDI Design and Implementation Plan that provides a detailed outline of topics, description of methodologies, and initial list of learning and delivery resources can greatly help in the Development phase.

45 What is Kahoot!? https://kahoot.com/what-is-kahoot/

4. Develop learning resource materials

Learning resource materials include:

Delivery Materials: Used by the LMT and learning service providers (resource person, learning facilitator, trainer) to implement the methodologies indicated in the LDI design to facilitate learning

Learning Materials: Used by the learners during and after LDI implementation to facilitate achievement of learning objectives and support learning application to the workplace

Figure 43. Categories of Learning Resource Materials

Following are examples of common types of learning resource materials that are used in implementing LDIs. The level of technology required to develop and use the materials increases from left to right.

Non-projected/ Non-printed	Printed / Electronic Format	Projected display	Audio-based	Multi-media
Marker boards Flipcharts Objects	Handouts Worksheets Pamphlets Manuals Reference materials Posters	Presentation slides	Music Digital audio file Podcast	Films Video clips Screencast Animated clips Interactive webpages
Low tech → High tech				

Table 26. Examples of Learning Resource Materials

The speed with which technology is evolving has significantly influenced the development of learning and delivery materials. From the most basic "chalk and talk" where a blackboard and a piece of chalk are all that a trainer/learning facilitator needs to deliver a lecture, the range of delivery and learning resource materials has expanded from low technology (low tech) use to advanced technology-use (high tech) types.

Key processes in developing learning resource materials:

- Using the checklist/matrix of materials prepared in the previous step as reference, identify existing materials for possible adoption or customization. Good sources are internal L&D database on completed programs, partner organizations, learning institutions, etc.

- Review existing materials with guidance of SMEs and determine which can be adopted as is or customized to enhance responsiveness to design.
- Note that sources of any materials developed by other individuals, groups or organizations should be acknowledged. Use and distribution of materials not originally created by the developers should comply with Republic Act 8293. Intellectual Property Code, Part IV. The Law on Copyright.[46]
    - Statements or text lifted in full and directly from an existing material developed by others have to be presented in quotation marks, and referenced.
    - Statements or text adapted (i.e., recast, modified, rephrased, etc.) from an existing material developed by others have to be referenced.
    - The American Psychological Association (APA) Style is the most commonly used style reference.[47]
- Refine existing materials or develop new materials as necessary, (e.g., presentation slides, cases, structured learning exercises, etc.) with the assistance of internal and/or external subject matter experts.
- Identify online collaboration tools and other applications that will be used to support identified methodologies. Prepare and format any activity instructions and questions that will be used. (For example, *Jamboard*[48] frames need to be prepared if the application will be used as a collaboration tool in any of the activities.)

Developing materials to guide delivery:

It is good practice to develop a session guide or a facilitator's guide to ensure that essential content will be covered using planned methodologies during LDI implementation. These guides are most applicable for training programs, and particularly helpful:

- When program will be conducted in several runs or rolled-out nationwide and delivery needs to be standardized
- In running complicated or technical programs that involve development of higher level of learning domains
- In implementing new programs
- When program will be handled by new trainers and facilitators

Following is a session guide template. A sample session guide is in Annex 23.

[46] Republic Act No. 8293. An Act Prescribing the Intellectual Property Code and Establishing the Intellectual Property Office, Providing for its Powers and Functions, and for other Purposes. https://www.officialgazette.gov.ph/1997/06/06/republic-act-no-8293/
[47] American Psychological Association. (2021). Common reference examples guide. https://apastyle.apa.org/instructional-aids/ reference-examples.pdf
[48] About Jamboard. https://workspace.google.com/products/jamboard/

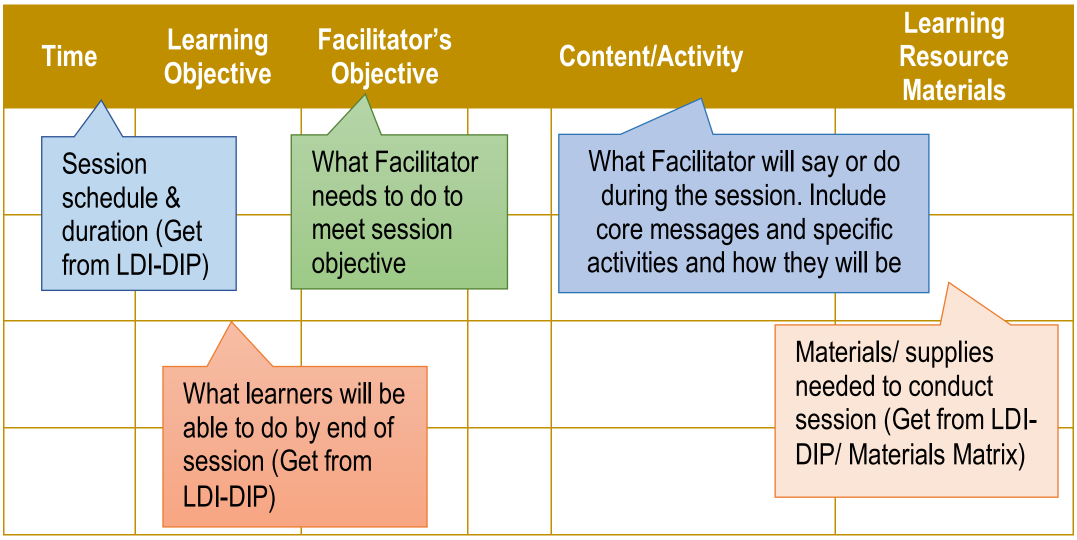


Table 27. Session Guide Template

A facilitator's guide is a variation of the session guide. It is more detailed in the sense that images of visual aids to be used are already incorporated. A sample facilitator's guide is in Annex 24.

5. Develop evaluation tools

- Review M&E Plan developed at the Design phase
- Prepare Level 1 (Reaction) evaluation tools
  - Post-Program Evaluation Form
  - Materials for formative Level 1 evaluation mechanisms
- Develop Level 2 (Learning) evaluation tools
  - Pre- and Post- intervention test
  - Materials for formative Level 2 evaluation mechanisms
- Develop Level 3 (Behavior) evaluation tools
  - Learning application plan
  - Learning application monitoring tools
- Develop Level 4 (Results) evaluation tools

(Refer to section on Design phase of this guidebook for a detailed discussion on developing evaluation tools.)

6. Pilot test materials

- Conduct alpha testing of learning resource materials among development team members to simulate use.
  - Note areas for improvement (e.g., readability of materials, clarity of activity instructions, etc.).
  - Refine materials as needed.

- Conduct beta testing of learning resource package among intended users, especially if LDI is designed for multiple runs or national roll out.
  - Solicit feedback from beta testing participants (target learners and facilitators)
  - Refine materials as needed.

7. **Finalize learning resource materials by checking adherence to general guidelines of:**

Criteria	Checkpoint
Relevance	Content essential or important to achieving learning objectives
Completeness	All essential content covered
Accuracy	Content fact-checked, up-to-date, and referenced
Clarity	Clear and direct messaging
Coherence	Organized, logical relationship of elements
Appeal to users	Readable, visible, audible (for multi-media) and aesthetically pleasing
User-friendliness	Easy to understand, accomplish, navigate or apply with minimum assistance
Inclusiveness	Socially inclusive (i.e., not discriminatory to any groups)
Adherence to DSWD branding	Follows guidelines on use of Agency logo, colors, presentation templates, etc., as indicated in the DSWD Brand Manual[49]

Supplementary Notes on the Development Phase

1. Preparing printed materials

- Use simple format and readable fonts.[50]
  - Although not a hard and fast rule, Serif font is more commonly used for text at small sizes in printed copy.
  - Choose the simpler rather than decorative font types.
    - Serif font types such as Times New Roman is a frequent choice for plain text reading as the letterforms make economical use of space.
    - Garamond, another Serif font type is often used in body text and books.[51]
  - Use only one to two-font types in a document for a more cohesive and professional look.

[49] DSWD Brand Manual Final 9.21. https://www.scribd.com/document/337808947/DSWD-Brand-Manual-FINAL-9-21-Interactive
[50] Choosing fonts for business documentshttps://edu.gcfglobal.org/en/business-communication/choosing-fonts-for-business-documents/1/
[51] Sans Serif vs Serif Font: Which Should You Use & When? https://www.impactplus.com/blog/sans-serif-vs-serif-font-which-should-you-use-when

- Use appropriate font size.
  - Most commonly used in text: 12-points (can range from 10-12 points)
  - For heading: 14-16 points

Figure 44. Serif and Sans Serif Fonts

- Provide sufficient margins and white spaces so material does not appear cramped.
- Incorporate charts and tables if these will be helpful in presenting data.
- Acknowledge sources.
- Make sure presentation slides printed as handouts are readable. Choose format with notes (e.g., one slide or three slides/page) if these are to be distributed during sessions so participants can write on the page.

2. Preparing presentation slides
   - Keep things simple: theme, template, and color.
   - Avoid fancy fonts.
     - Sans Serif fonts are generally considered easier to read in projected materials.
     - Recommended fonts are Arial, Verdana, Tahoma.
   - Use appropriate font size.
     - For body: 28-32 points
     - For heading: at least 40
     - For labels of graph, table, etc.: 20-24

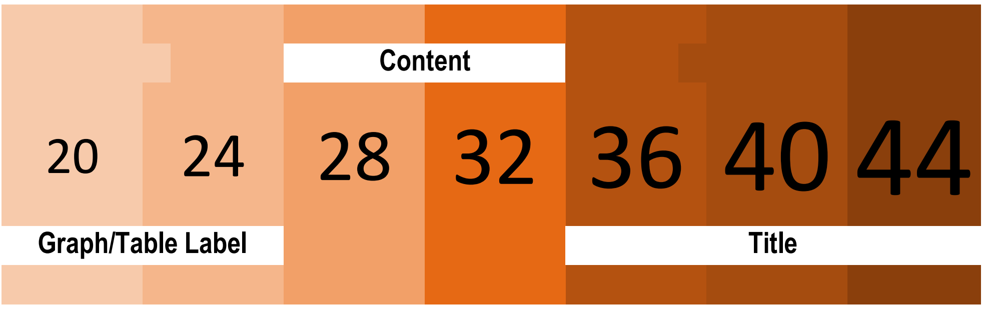


Table 28. Suggested Font Sizes for Presentation Slides

There is no hard and fast rule on what types of fonts to use for printed and other materials format. While many believe that serif is more legible in print, and sans serif in computer screens, the growing consensus is either font type can be legible, regardless of format. The choice boils down to the font that best fits the message and desired look.

Choosing Fonts for Business Documents. https://edu.gcfglobal.org/en/business-communication/choosing-fonts-for-business-documents/1/

- Avoid text-heavy slides.
  - Aim for brevity, but ensure that salient points are covered.
  - Use the 6 x 6 rule (6 lines and 6 words per line for each slide) only as a guide.
  - Avoid excessive use of bulleted text.
  - Explore SmartArt features and use appropriately. (Figure 47 shows how both bulleted text and SmartArt format can be used in slides.)

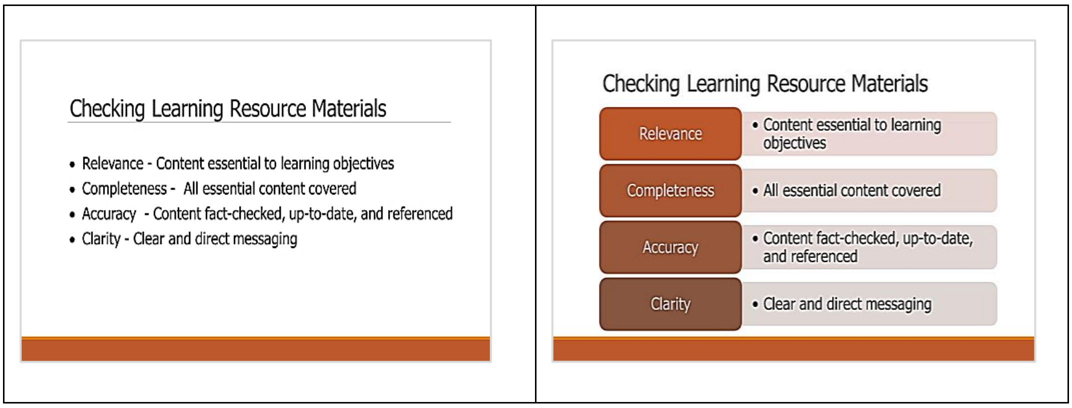
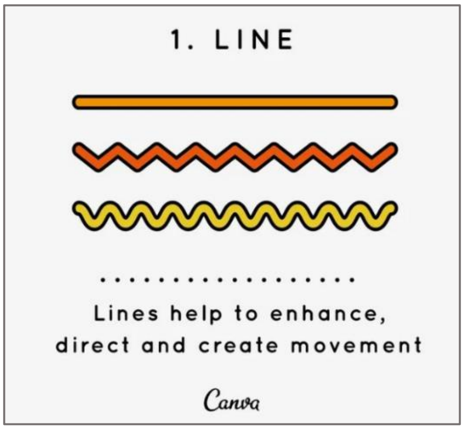
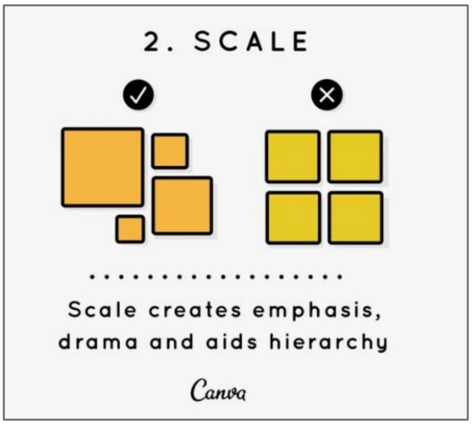


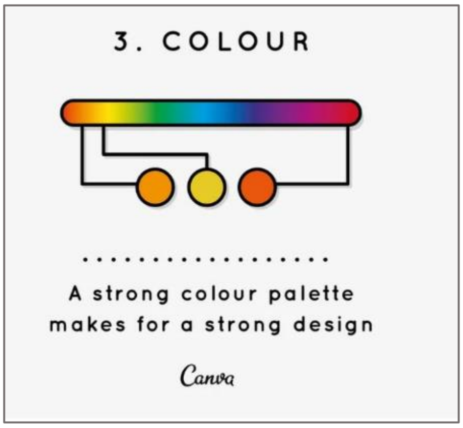
Figure 45. Use of Bulleted Text and SmartArt in Slides

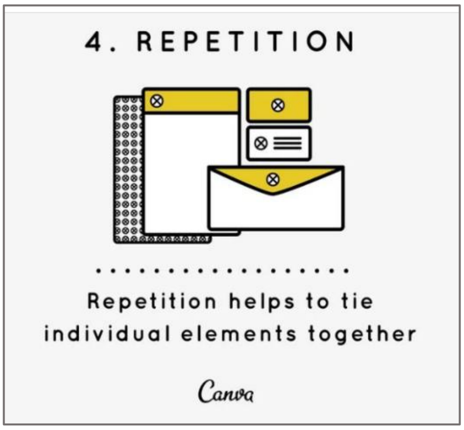
- Leave margins and a lot of white spaces.
- Avoid distracting animations and transitions.
- Use high-resolution images.
- Use appropriate software and application tools in creating presentation slides, considering available hardware and technology capabilities. Most commonly used are PowerPoint, Prezi, Canva, and Keynote.

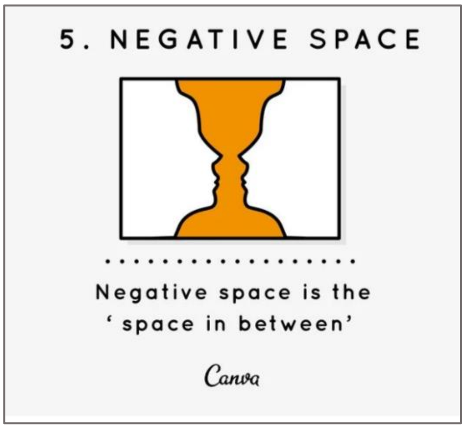
➲ Ensure that design elements are aesthetically pleasing. This will help catch the interest of learners and sustain their motivation to focus on the sessions. Apply key design principles to ensure that the most important elements are what are immediately perceived by the learners. Some of these are :

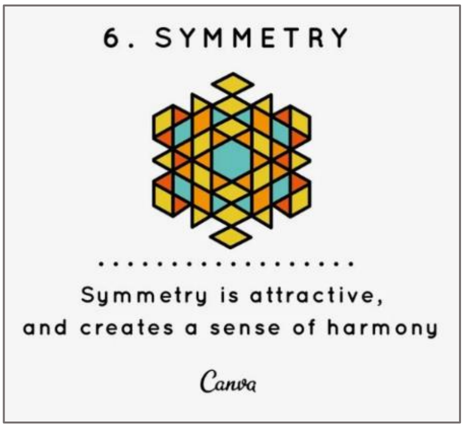


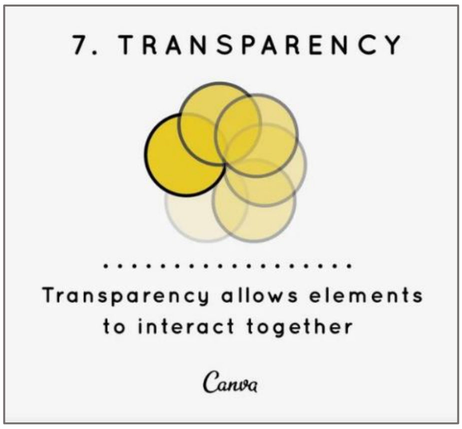












A complete presentation and discussion of these design principles (developed by Canva) may be accessed at: Design elements and principles. https://www.canva.com/learn/design-elements-principles/

3. Developing and selecting audio files
   - Review learning objective and key messages that will be covered in the material.
   - Organize audio content and determine length of material before recording.
   - Prepare detailed script to avoid unnecessary ad lib and improvisation during recording.
   - Ensure that inclusive language is used.
   - Practice reading script to check pacing, volume, and clarity of voice.
   - Check performance of recording gadget; do a test recording to assess quality of output.
   - Record in a quiet room; ensure that background noise is nil or minimal.
   - Run audio file and check for length, clarity of delivery and overall quality of output.
   - In selecting podcasts and other audio files from the internet:
     - Ensure relevance to the learning objective.
     - Check if language and delivery match learner profile.
     - Acknowledge source.
     - Check for length, clarity, and overall quality of audio file.

4. Developing and selecting video files
   - Review learning objective and key messages to be covered in the material.
   - Plan detailed video content, flow, length, and format before recording.

- Develop a storyboard.[52] (Please see annex 25 for a sample storyboard structure of an interactive session for e-learning).
- Get prior permission and arrange schedules if communities, groups, offices, or individuals will be filmed.
- In selecting video files from the internet:
    - Check:
        - Relevance to the learning objective
        - Appropriateness of language and delivery to learner profile
        - Resolution and clarity of images and sounds
        - Length of file (videos are best kept to less than 15 minutes)[53]
    - Acknowledge source.

5. Using images, especially of children[54]
    - Always ask permission before taking photographs or video shots.
        - Young children cannot give consent on their own. They need permission from a parent or guardian.
        - Parents and guardians must give free and informed consent only after they have been briefed on the use of the images as well as its risks and benefits.
    - Do not use any photographs/video images that might in any way hurt anyone or put people at risk (e.g., victims of domestic violence or child abuse, children in conflict with the law, etc.).
    - All images used formally and publicly should have formal (written) consent granted.

6. Using inclusive language and elements in developing materials
    - Be mindful that inclusive language is used in all materials, regardless of formats (e.g., printed, electronic, audio, multi-media, etc.). This means using "language that is respectful and promotes the acceptance and value of all people. It is language which is free from words, phrases or tones that demean, insult, exclude, stereotype, infantilize or trivialize people on the basis of their membership of a certain group or because of a particular attribute."[55]

---

[52] "A panel or series of panels on which a set of sketches is arranged depicting consecutively the important changes of scene and action in a series of shots (as for a film, television show, or commercial." Merriam-Webster. (n.d.). Storyboard. In Merriam-Webster.com dictionary. Retrieved November 10, 2021, from https://www.merriam-webster.com/dictionary/storyboard)

[53] Video Length in Online Courses. https://www.qualitymatters.org/qa-resources/resource-center/articles-resources/research-video-length

[54] Adapted from: Child Rights International Network. Using Images of Children in the Media. https://archive.crin.org/en/guides/communications/media-toolkit/ngo-communications/using-images-children-media.html

[55] The University of Queensland. UQ Guide to Using Inclusive Language. https://staff.uq.edu.au/files/242/using-inclusive-language-guide.pdf

Following are some guidelines:

- Ensure that language, images, and illustrations do not stereotype or demean people based on economic background, cultural grouping, religion, political affiliation, socio-economic status, etc.

Recommended	Not Recommended
People living below poverty line	Poverty-stricken
Indigenous people	Primitive people
Undocumented people	Illegal aliens

- Avoid ableist language, or "language that is offensive to people with disability. It can also refer to language that is derogatory, abusive or negative about disability. Ableism is the systemic exclusion and oppression of people with disability, often expressed and reinforced through language."[56] Below are examples:

Recommended	Not Recommended
Before finalizing, give everything a final check for completeness and clarity.	Before finalizing, give everything a final **sanity-check.**
It slows down the process, causing delays in some areas.	It **cripples** the process, causing delays in some areas.
When designing an LDI pay attention to unique learning styles of certain individuals and groups.	When designing an LDI do not **turn a blind eye** to the unique learning styles of certain individuals and groups.

- Use "people-first" when referring to people with disabilities. Examples:

Recommended	Not Recommended
People with disability	Disabled, Handicapped
People with epilepsy	Epileptic
Person living with AIDS	AIDS sufferer
Person with hearing difficulty	Deaf

- Avoid unnecessarily gendered language. Be mindful of pronouns used and other possible sources of gendered language.[57] Examples:

[56] What Is Ableist Language and What's the Impact of Using it? https://pwd.org.au/resources/disability-info/language-guide/ableist-language/
[57] Writing Inclusive Documentation. https://developers.google.com/style/inclusive-documentation

Recommended	Not Recommended
Consider the staffing needed to implement a conference for 100 participants.	Consider the **manpower** needed to implement a conference for 100 participants.
It will take at least five person-hours to edit a one-minute video clip.	It will take at least five **manhours** to edit a one-minute video clip.
The venue is big enough to accommodate all the fisherfolks who have been invited to the consultation meeting.	The venue is big enough to accommodate all the **fishermen** who have been invited to the consultation meeting.
This handbook is for use of first-year students.	This handbook is for use of **freshman** students.

- Avoid “slash/constructions” as they result to awkward writing for the sake of gender equity. Examples:[58]

Recommended	Not Recommended
• Each learner can plan his or her schedule. • All learners can plan their schedule.	• Each learner can plan his/her schedule.
• Each alumnus or alumna is sponsored to attend the symposium. • All alumni are sponsored to attend the symposium.	• Each alumnus/alumna is sponsored to attend the symposium. • Each alumnus/na is sponsored to attend the symposium.

➲ Check that materials can be accessed and navigated by all learners, including those with disabilities in hearing, seeing, physical movements, etc. If necessary, plan for the provision of auxiliary aids and services during LDI delivery (e.g., providing interpreters or other means of delivering materials to learners with hearing disability; providing readers, taped tests, or other means of delivering materials to learners with visual disability; etc.).[59]

The American Psychological Association (APA) has published a reference material, *General Principles for Reducing Bias* to promote the “use of language that is free of bias and avoid perpetuating prejudicial beliefs or demeaning attitudes” in written materials. This may be accessed at: https://apastyle.apa.org/style-grammar-guidelines/bias-free-language

[58] https://wmich.edu/writing/genderbias
[59] RA 7277 – An Act Providing for the Rehabilitation, Self-Development and Self-Reliance of Disabled Persons and their Integration into the Mainstream of Society and for other Purposes. https://www.ncda.gov.ph/disability-laws/republic-acts/republic-act-7277/

In summary:

- The Development phase takes off from the LDI design and the M&E plan prepared during the Design phase. It covers processes for identifying, conceptualizing, producing, and evaluating learning resource materials that will support delivery and facilitate learning.
- It is best carried out by a team of specialists with grounding on adult learning and development of learning resource materials, graphic/multimedia specialists, and subject matter experts.
- A number of activities have to be done before actual preparation of materials. These include: reviewing the LDI design, learner profile, and available resources; fleshing out the content; and determining specific types of materials to be developed.
- There are three kinds of materials that are conceptualized and developed during this phase: 1) delivery materials that will be used by the LMT and LSP to implement the methodologies; 2) learning materials that will aid acquisition of learning during the conduct of the LDI and transfer of learning to the workplace; and 3) evaluation tools.
- Access to the Internet and unceasing technological innovations have significantly influenced the development and applications of learning and delivery materials. The range of resource materials has greatly expanded from low technology- to advanced technology-use types.
- Existing learning resource materials may be used. However, they need to be thoroughly reviewed, and modified if necessary to ensure that they are directly aligned to the learning objectives, and responsive to the needs of the target learners.
- It is good practice to develop a session guide to ensure that LDIs that will be implemented in several batches or rolled out nationwide are delivered in a consistent manner, regardless of who will handle the activities. A session guide is likewise helpful when implementing LDIs that are new or involve more complex/ higher level of learning domains.
- All learning resource materials and evaluation tools that are developed need to adhere to general guidelines of relevance, completeness, accuracy, clarity, coherence, appeal to users, user-friendliness, inclusiveness, and compliance with DSWD branding.

IMPLEMENTATION

This section of the L&D Guidebook will cover:

- Purpose and value of the Implementation phase
- Scope and outputs of the Implementation phase
    - Program Management
    - Team Management
    - Resource and Welfare Support Management
    - Leaning Management
- Key roles in the Implementation phase
- Implementation key tasks, guidelines, and standards
    - Pre-delivery
    - Delivery
    - Post-delivery

Robert and his team are all set to implement the course on Managing Change for PSWDOs. The LDI-DIP, M&E Plan, and corresponding learning and delivery materials are ready.
The team is so excited to get started!
However, they know that there are so many things to attend to.
It's time to meet and discuss the following concerns.

VIII. Implementation

The LDI Design and Implementation Plan (DIP) and M&E Plan prepared during the Development phase are executed during the Implementation phase.

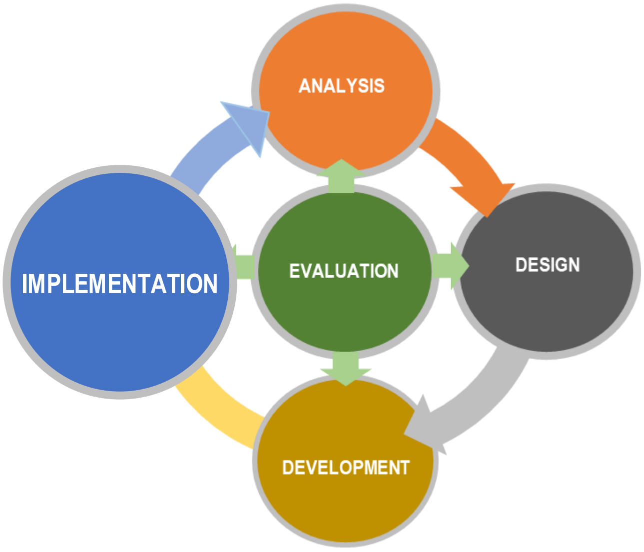


Figure 47. Implementation Phase

A. Purpose and Value of the Implementation Phase

The Implementation phase ensures that the LDI is delivered as planned to intended learners using the learning resource packages that have been developed to address their competency development needs. It also supports the transfer of learning on the job so that targeted improvements in learner performance and targeted outcomes in the workplace are achieved.

B. Scope and Outputs of the Implementation Phase

Implementation is undertaken along four clusters of tasks during pre-delivery, delivery, and post-delivery of LDIs, regardless of whether face-to-face, online, and blended learning delivery modes are used.

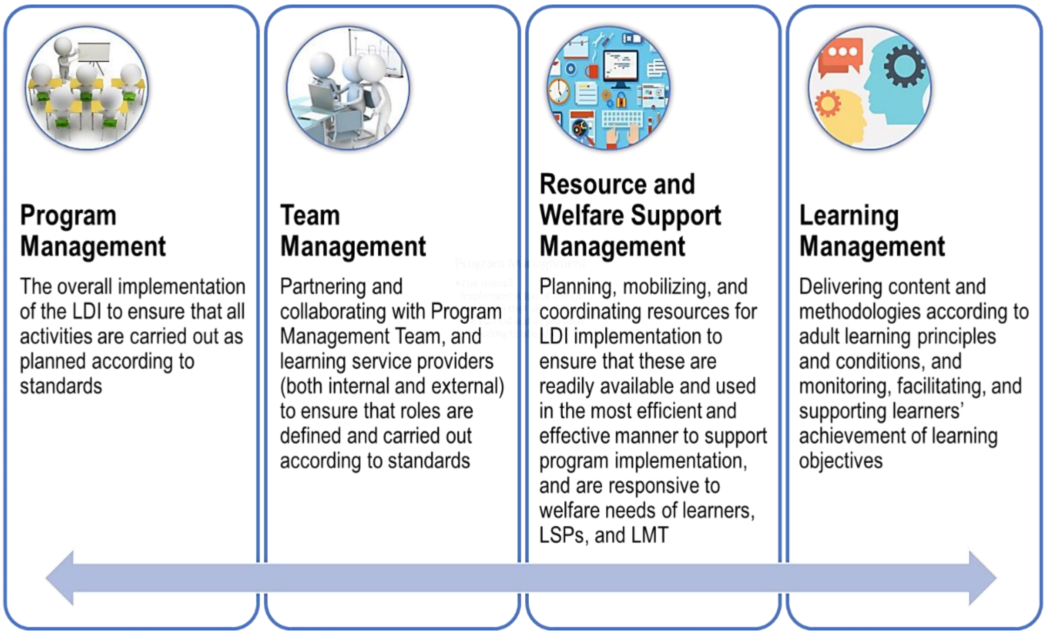


Figure 48. Clusters of L&D Implementation Tasks

The overlapping tasks in program management, team management, resource and welfare support management, and learning management are orchestrated in LDI Implementation to optimize learning experiences and achieve learning objectives.

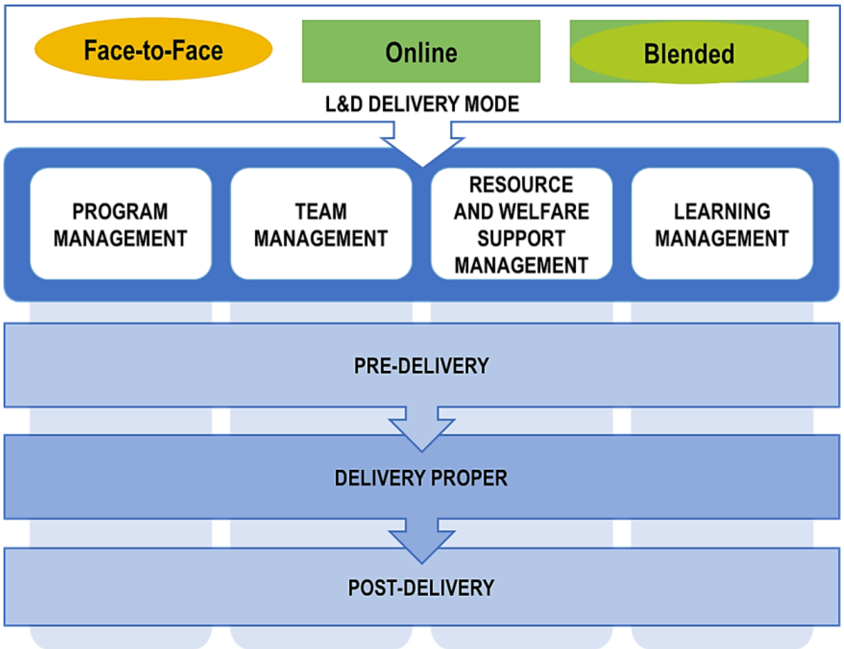


Figure 49. LDI Implementation Framework

At the end of the Implementation phase, the following outputs are produced, primarily for formal learning.

- Completed learners' outputs (as required, including LAPs)
- Accomplished evaluation tools (learning assessment tools and LDI evaluation)
- LDI Completion Report
- CPD Monitoring and Completion Report (if CPD units will be credited to learners)

C. Key Role Players in the Implementation Phase

The following responsibilities are fulfilled by different key players in the Implementation phase.

Key Player	Responsibilities

Learning Management Team (LMT)
• Team Leader
• Specialists with grounding on:
  ○ adult learning
  ○ LDI management
  ○ M&E
	▪ Oversees the pre-delivery, delivery, and post-delivery LDI processes and resources
	▪ Ensures that all aspects of LDI implementation are attended to, including:
	  ○ Program management
	  ○ Team management
	  ○ Resource and welfare support management
	  ○ Learning Management
	▪ Coordinates with managers/supervisors to ensure that support is provided for workplace learning application

Key Player	Responsibilities
	▪ Monitors learning activities and administers M&E tools ▪ Submits reports on LDI implementation to management
Learning Service Providers	▪ Coordinate with the LMT on learning session delivery requirements ▪ Conduct learning activities (as facilitators, resource persons, coaches, etc.) according to the LDI design
Managers/ Supervisors	▪ Communicate the importance of the staff's (learner's) LDI participation and the expectations upon return to the job ▪ Agree on the focus of learning application plan with the learner ▪ Provide conditions and support for workplace application of learning
Learners (DSWD SP staff, intermediaries, and stakeholders)	▪ Participate in LDIs to address their competency development needs ▪ Seek opportunities and ways to apply learning on the job ▪ Develop and implement a LAP

Table 29. L&D Implementation Key Players and Roles

D. Implementation Key Tasks, Guidelines, and Standards

During LDI Implementation, the LMT simultaneously implements the program, team, resource and welfare support, and learning management tasks in pre-delivery, delivery, and post-delivery. To provide for a complete learning experience, the team focuses on providing learners with learning opportunities within and beyond the LDI and thus, attends to tasks related to workplace learning application as specified in the LDI-DIP.

The discussion in this section focuses primarily on formal learning but highlights some unique tasks in implementing non-formal learning. Details of activities related to Monitoring and Evaluation are explained in greater detail in the corresponding section.

A COMPLETE LEARNING EXPERIENCE happens when the learning process is managed not just during the conduct of the "event" – the LDI, but just as importantly, before and after it takes place. Therefore, managers/supervisors must get on board by engaging them in the planning and implementation of their staff's (learner) plans for workplace learning application.

Adapted from The Six Disciplines of Breakthrough Learning. https://the6ds.com/wp-content/uploads/2017/03/Introduction-to-the-6Ds-3.0.pdf

➲ LDI Pre-Delivery

As an old Irish proverb says, "well begun is half done." This underscores the importance of being organized and thorough in attending to LDI pre-delivery tasks. Guided by the LDI-DIP and M&E Plan, the LMT undertakes preparatory activities to ensure that all requirements for the successful delivery of the LDI are adequately provided. Specific tasks along the four management areas include the following.

Program Management	Team Management	Resource and Welfare Support Management	Learning Management
▪ Dissemination of information about the planned LDI to targeted learners, their supervisor, and guest ▪ Contracting of resource persons/subject matter experts ▪ Pre-registration and attendance confirmation ▪ Organization of pre-delivery requirements ▪ Installation of online LDI materials in the LMS or virtual classroom software	▪ LMT & LSP organization, mobilization, and role clarification	▪ Identification of welfare and resource requirements ▪ Procurement of needed resources ▪ Set-up of the learning venue ▪ and other administrative arrangements	▪ Ensuring adequacy of time for MOL ▪ Preparation of Management of Learning (MOL) tools and materials ▪ Preparation for delivery of LDI sessions (especially online)

Table 30. Key Tasks in LDI Pre-Delivery

Mobilizing the LMT

Key to the accomplishment of these tasks is the selection of a competent team to manage the LDI. Considering the various aspects of implementation that need to be attended to, it is ideal to have team members who are focused on specific LDI management areas but working together in a coordinated manner. During team mobilization, assigned members should fully understand their roles and corresponding responsibilities in the pre-delivery, delivery, and post-delivery stages of LDI implementation.

Team Roles	Pre-Delivery	Delivery	Post Delivery
LMT Lead	Oversees preparations for LDI implementation Mobilizes the LDI team	Directs LDI implementation activities	Ensures completion of all LDI closure requirements

Team Roles	Pre-Delivery	Delivery	Post Delivery
	Collaborates with internal and external LSPs to ensure their engagement in achieving the learning objective Coordinates with managers/supervisors on learners' LAP	Monitors learning activities and addresses implementation issues Provides technical assistance to LSPs, as needed Facilitates daily debriefing sessions	Leads the end of program evaluation Coordinates with managers/supervisors on implementation concerns Provides assistance to managers/supervisors and learners, as needed Leads the post-LDI debriefing session
Learning Assistant	Attends to learning process requirements (e.g., uploading of LDI materials to be retrieved during sessions, analysis of pre-LDI competency assessment, etc.)	Supports LSPs in the conduct of learning sessions Assists in navigating the virtual learning platform (online LDIs) Participates in daily debriefing sessions	Attends to closure activities, including preparation of the completion report (Annex 26) Participates in the post-LDI debriefing session
Administrative Assistant	Organizes administrative and logistics requirements	Attends to administrative needs and concerns Participates in daily debriefing sessions	Ensures payment for procured materials and services including LSPs Participates in the post-LDI debriefing session
Welfare Support Coordinator	Ensures provision for well-being needs of learners, LMT, and LSPs (e.g., meals, accommodation, first aid kit, etc.)	Monitors well-being of learners, LMT, and LSPs Attends to their emerging needs Participates in daily debriefing sessions	Participates in the preparation of the LDI Completion Report Assists the Administrative Assistant in the processing of payments Participates in the post-LDI debriefing session
Learning Service Provider (internal and external)	Reviews LDI design Prepares for delivery of LDI learning activities Familiarizes self with the learner profile	Acts as subject matter expert, facilitator, coach, etc. depending on LDI type Participates in daily debriefing sessions	Submits any required post-LDI report Participates in the post-LDI debriefing session
IT Specialist	Uploads the learning resource package to the LMS or alternative online classroom software Prepares user guides and orientation materials	Manages the online learning platform Provides technical support to ensure that online learning activities are smoothy conducted Participates in daily debriefing sessions	Evaluates the effectiveness and efficiency of the LMS or alternative online classroom software that was used Participates in the post-LDI debriefing session

Team Roles	Pre-Delivery	Delivery	Post Delivery
Documenter	Prepares equipment and familiarizes self with the documentation tool	Records proceedings, outputs, and evaluation results Participates in daily debriefing sessions	Prepares and submits a documentation report Participates in the post-LDI debriefing session

Table 31. LMT Roles in the Implementation Phase

Team composition vary depending on the type of LDI, delivery mode, number of learners, and availability of resources.

- For face-to-face formal learning activities, it would be necessary to have members performing the roles identified in Table 33, especially for residential LDIs. An IT specialist may not be required, especially if the Learning Assistant has the adequate technical know-how to assist the LSP in using Web-based application tools.
- Where a high level of interaction is expected, a minimum of one Learning Assistant for every 30 learners is recommended.[60] The ratio is more flexible for less interactive LDIs (e.g., seminars, webinars).
- The IT Specialist plays an important role in online LDIs since success in their implementation is contingent upon the provision of a smoothly operating online learning platform and ready access to support when technology fails.
- Assignment of documenters depends upon the kind of documentation required. For example, there should be more documenters if the output is a process documentation[61] or outputs of several small-group discussions.
- If staff who can be tapped to be a part of the LMT is limited, it is important to agree on multi-tasking arrangements.
- LSPs include resource persons/subject matter specialists, facilitators, and coaches who may be from within or outside DSWD. They are engaged as specified in the LDI-DIP and contracted according to the DSWD procurement process.
- The involvement of managers/supervisors begins once the learners have been identified. The LMT communicates with them to discuss how they will be expected to support their staff (learner) during LDI delivery and afterwards when they implement their LAP. This is a critical step in ensuring that the planned complete learning experience is realized for learners.

Confirming Participants and Organizing Resources

Following team mobilization, the LMT Lead orchestrates efforts among the team members as they perform their respective tasks to prepare all delivery

[60] Department of Social Welfare and Development Administrative Order No. 02, Series of 2021 on Guidelines in Conducting the Department of Social Welfare and Development's Knowledge Sharing Sessions
[61] Ibid.

requirements as specified in the LDI-DIP. The kick-off activity is an LMT orientation where implementation requirements are discussed. These include: [62]

Category	Requirements
Learner Registration and Confirmation	▪ Communication to prospective learners and supervisors ▪ Registration and confirmation mechanism ▪ Learners' profile, including special dietary requirements and auxiliary learning support (e.g., interpreter, etc.)
Authorizations and Agreements	▪ LMT authority to implement LDI ▪ Learners' authorization to participate ▪ LSP's MOA and TOR
LSP Orientation	▪ LDI design ▪ LSP's delivery materials
Financial Requirements	▪ Budget ▪ Cash advance ▪ Requests for payments ▪ Financial report
Logistical Requirements	▪ Contracted service providers for the venue, transportation, meals, and accommodations (as needed) ▪ LDI venue seating arrangement/lay-out (Annex 27) ▪ Provisions for learners with special needs ▪ Procured supplies, materials, and equipment ▪ Confirmed access to communication facilities (including the Internet) ▪ Reservations for internally available resources (e.g., venue, equipment, etc.)
Learners' Materials	▪ Learners' kits containing: – LDI information (objectives, schedule, and venue) – Learning materials such as handouts, worksheets, manuals, etc. – Information about the travel and accommodation for residential LDIs (location, contact details, safety, and evacuation plan, travel, and rooming arrangements, etc.)
M&E tools	▪ LDI evaluation tools – Level 1 (Reaction): Post-LDI Evaluation – Level 2 (Learning): Pre- and Post-LDI Knowledge Tests

[62] Adapted from Department of Education (DepEd) Learning and Development System Manual. (2019). Basic Education Sector Transformation Program, Australian Government Department of Foreign Affairs and Trade.

Category	Requirements
Reporting tools	▪ LDI Documentation template ▪ LDI Completion Report template

Table 32. LDI Pre-Delivery Requirements

Supplementary Notes on LDI Pre-Delivery

- In the initial communication to prospective learners and their supervisors, make sure that all pertinent information about the LDI is provided, expectations from learners and their manager/supervisor are clearly discussed, and requirements for participation are explained (e.g., need to be relieved from work, required equipment and technology for online learning, etc.).
- Where possible, conduct registration through an online software application to facilitate data collection and collation. For example, *Google Forms* has a feature that allows data to be generated in a worksheet format (Excel). The same can be done for evaluation tools that will be used.
- Plan and monitor LDI preparations by using the LDI Implementation Checklist (Annex 28) to ensure that all requirements for LDI delivery are identified and provided at the appropriate time.
- Budgeting should be done after all implementation requirements have been identified. The detailed listing in the LDI Implementation Checklist will guide more accurate costing.
- Practice cost-efficiency and environmental awareness in procuring and packaging learning materials. For example, use thumb drives to store voluminous handouts and/or manuals, use reusable bags for kits, refillable markers, etc.)
- In selecting the LDI venue, the primary consideration is the conduciveness of the environment to support optimal participation of learners and smooth implementation of learning activities. Thus, select venues that are appropriate to the LDI activities and provide safe and comfortable accommodations for the learners, LSPs, and LMT.
- Conduct regular LMT meetings to monitor progress in the preparations and address implementation issues that may arise.

For online LDIs, the LSPs and Learning Assistant/s must conduct at least a techno run to practice navigating the online learning application and tools that will be used. Develop a contingency plan to provide for technology glitches.

Ensure that all leaner materials are uploaded in the virtual learning application platform (or LMS if installed) at least a week before the start of the LDI to give learners sufficient time for preparations. This is especially important if there are pre-work and/or asynchronous activities included in the LDI design.

➲ LDI Delivery

Learners go through the learning journey during LDI delivery. Hence, it is essential to provide a conducive environment where learners feel physically, psychologically, socially, and culturally secure to engage in the learning process. It is a shared responsibility of the LSPs who guide learners through their learning journey and the LMT who supports them by ensuring that they have all the resources they need along the way.

Key tasks in LDI delivery are as follows.

Program Management	Team Management	Resource and Welfare Support Management	Learning Management
▪ Issuance of LDI kits ▪ Attendance monitoring ▪ Overseeing the conduct of LDI activities ▪ LDI monitoring and evaluation, including end-of-day debriefing sessions ▪ Planning of next steps to sustain learning ▪ Issuance of completion certificates ▪ LDI documentation ▪ Application for crediting of CPD units	▪ LMT & LSP performance monitoring and feedback	▪ Monitoring and documentation of disbursements ▪ Ensuring quality and availability of logistics, learning materials, etc. when needed ▪ Attending to the comfort, safety, well-being, and administrative needs of learners and team	▪ Setting of learning climate ▪ Monitoring of presentation and facilitation guidelines application in LDI sessions ▪ Monitoring of learners' participation and progress ▪ Provision of learner support as needed ▪ Facilitation of MOL activities, as needed ▪ Conduct of integration session, including LAP preparation

Table 33. Key Tasks in LDI Delivery

Well-managed preparations in LDI pre-delivery set the stage for a successful LDI delivery. Most delivery key tasks are geared towards facilitating the acquisition of learning through the conduct of the different LDI activities and provision of learning support mechanisms. Three clusters of tasks are implemented.

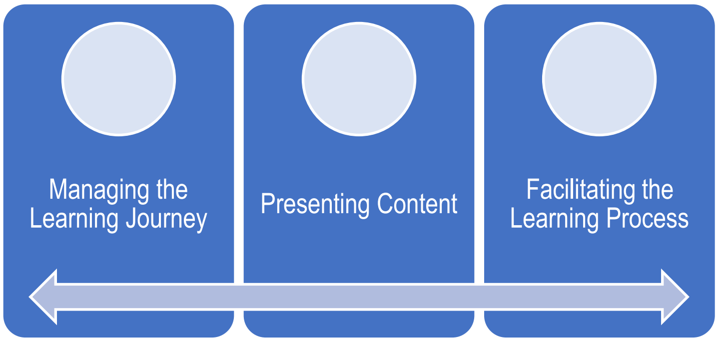


Figure 50. Learning Management Key Tasks

Managing the Learning Journey

The LDI design identifies the different delivery methodologies and support mechanisms that will facilitate learning. These components are organized to guide learners to weave learning events into a meaningful journey.[63] To achieve this, the LSP or learning facilitator implements activities for unfreezing, assimilation, and integration.

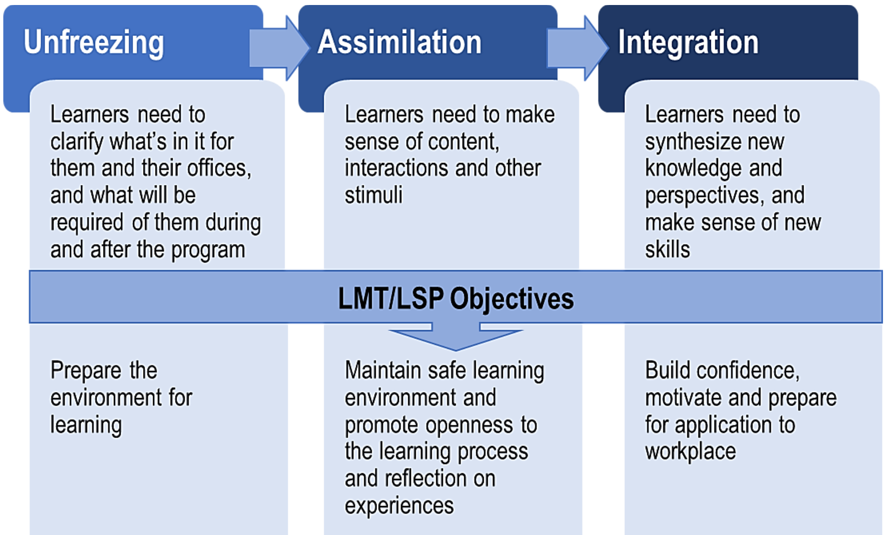


Figure 51. Phases of Learning

The key tasks are:

- **Unfreezing**. Facilitating activities to make the learners comfortable and secure in the learning environment, including getting-to-know-you (GTKY) activities, leveling of expectations, and norm-setting.
- **Assimilation**. Applying planned LDI methodologies to deliver content and facilitate activities that will help achieve learning objectives. This also includes providing opportunities for reflection and engaging learners in generating insights.

[63] Law, D., 2016. Creating a great learning journey, *Training Journal*. https://www.trainingjournal.com/articles/feature/creating-great-learning-journey

- **Integration**. Guiding learners in synthesizing learning, identifying opportunities for application, and planning for workplace application.[64]

Learning mechanisms may also be put in place.

- Aside from unfreezing activities, the learning climate can be sustained by organizing host teams, group sharing, and extra-curricular activities; and embedding energizers and group games in learning sessions.
- Feedback and communication can be promoted through the posting of bulletin boards, freedom wall, and parking lot; exchange of affirmation notes and messages in group chats and blogs; and conduct of temperature checks and feedback sessions.
- Learning integration and application can be facilitated through reflection activities, self-assessment instruments, mind mapping, gallery posting of LDI outputs, learning journals, individual development plans, and workplace application plans.

Unfreezing activities include icebreakers and energizers.[1]

- **Icebreakers** are designed to make learners more comfortable with other learners by encouraging conversation and providing opportunities to get to know each other. These are conducted at the beginning of an LDI.
- **Energizers** are short fun activities that perk up the learners and keep them engaged. These are most useful at the start of the day or after meals when energy levels tend to be low, or at any point in the session when it is observed that leaners' interest and motivation are waning.

These activities may be used for different purposes during an LDI.

- **Facilitating introductions**. Activities to know about co-learners' names, professional affiliation, and relevant personal information puts learners at ease with each other. Some examples are *People Bingo*, *Zodiac Signs*, *Birth Order*, *Two Truths and a Lie*, among others.
- **Reengaging leaners**. Activities to raise level of energy and alertness liven up leaners for forthcoming session activities. Some examples are physical activities such as stretching exercises, scavenger hunts, song relays, and dancing; and brain teasers like puzzles and riddles.
- **Introducing topics**. Activities that lead into the content that will be covered in the LDI session generates interest and helps establish learning needs and expectations. Among these activities are pop quizzes, word clouds, and mind maps.

[64] Asian Development Bank. (2018). KALAHI-CIDSS National Community-Driven Development Program Training Management Guidebook. ADB, Manila.

- **Reviewing concepts learned**. Activities that allow learners to share key learning from previous sessions are creative ways to start a Management of Learning session. The more popular ones are energizers like the *Ball Toss, Cabbage Relay,* and *Charades*.

  It is important to note that energizers by themselves are not Management of Learning (MOL) activities. In addition to surfacing concepts learned from the session/s, learners should be guided through the process of reflecting on and articulating insights and how these can positively change their thinking and behavior.

The Training Resource Guidebook that was developed by the Philippines-Australia Human Resource Development Facility (PAHRDF) contains examples of icebreakers, energizers, and MOL activities for your reference. It can be accessed at https://www.australiaawardsphilippines.org/km-1/publications-old/pahrdf-training-resource-guidebook-v1-01.pdf

There are also numerous sources of online versions in the Web. Some examples can be accessed in the following links.

- https://www.sessionlab.com/blog/online-energizers/#what-is-the-purpose-of-online-energizers
- https://www.howspace.com/resources/13-online-icebreakers-energizer-activities-and-games-to-make-your-next-workshop-more-engaging
- https://bigbangpartnership.co.uk/26-online-energizers-for-virtual-teams-and-remote-meetings/

Presenting Content

In LDI delivery, LSPs present assigned LDI session topics using delivery materials prepared during the Development phase in a clear and engaging manner within the allotted time. Two types of presentations are usually applied in LDIs – informative presentations that download information or promote understanding of ideas; and persuasive presentations that aim to convince the learner to change their attitudes or behaviors.[65]

The success of the presentation is judged not by the knowledge you sent but by what the listener receives.

Lilly Waters (Motivational Speaker)

The following guidelines are offered to successfully achieve presentation objectives.

[65] Adapted from iStudy for Success (n.d.) Types of Presentations. Pennsylvania State University. http://tutorials.istudy.psu.edu/oralpresentations/oralpresentations2.html#:~:text=Types%20of%20Presentations.%20There%20are%20two%20basic%20types,understanding%20of%20an%20idea%20or%20to%20convey%20information.

- **Connect with the learners**. Establish a friendly atmosphere – greet learners and try to call them by name. Exude enthusiasm. Share relevant personal experiences.
- **Communicate with authority**. Speak with confidence. Encourage learners to ask questions and respond appropriately. Park questions when you need to gather more information.
- **Express non-verbal messages effectively**. Use appropriate gestures. Keep a relaxed and open posture. Be well-groomed and appropriately dressed.
- **Use voice appropriately**. Use short sentences and simple language. Vary pace, pitch, and tone for maximum impact. Pronounce words clearly, use appropriate pauses, and avoid "crutch" words (e.g., like, ahh, you know, so, etc.).[66]

Some tips on presenting online

Virtual presenters must master the virtual platform to be able to make full use of its features. It is important to coach learners on the use of platform tools so they can engage in learning activities.

Adapted from: Tamanini, K.(2021). 10 Things You Should Learn If You Want to Be a Better Virtual Facilitator. http://en.atdchina.com.cn/atd-blog/10-things-you-should-learn-if-you-want-to-be-a-better-virtual-facilitator

When presenting online, be mindful of the limitations of the medium that you use. Make sure that your full face and gestures can be seen within the bounds of the screen frame. Look at the camera to maintain eye contact. Minimize background sounds. Use a neutral and clutter-free background with sufficient lighting. Be comfortable with periods of silence as bandwidth issues can affect the transmittal of communication.

Lerner, K (2020). https://presentationteam.com/top-delivery-tips-for-amazing-web-based-meetings-and-presentations/

Since learners in online activities have a shorter virtual attention span, re-engage them through polls, chats, energizers, breaks, and other strategies. Encourage interaction by asking learners to use the chatbox, learners' buttons (raised hand, emoticons), Q&A, and other tools.

National Association of Country and City Health Officials (n.d.). Introduction to Virtual Facilitation for Collaboration. https://www.naccho.org/uploads/full-width-images/Introduction-to-Virtual-Facilitation-for-Collaboration.pdf

Facilitating the Learning Process

Facilitators help foster learning by encouraging and sustaining learner involvement in the LDI activities and processes. They play various roles in delivering LDI sessions and activities.

[66] Adapted from Asian Development Bank. (2018). KALAHI-CIDSS National Community-Driven Development Program Training Management Guidebook. ADB, Manila; Lerner, K (2020). Top Delivery Tips for Amazing Web-based Meetings and Presentations. *Presentation Team*. https://presentationteam.com/top-delivery-tips-for-amazing-web-based-meetings-and-presentations/.

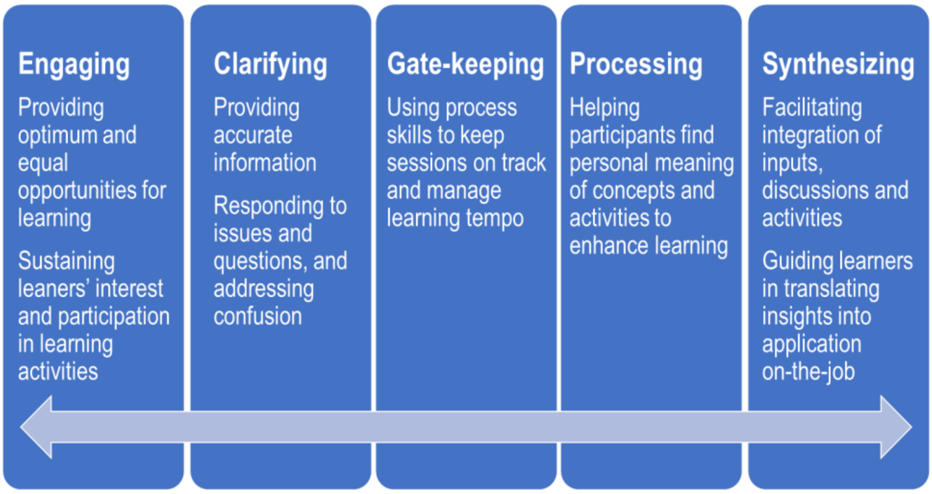


Figure 52. Facilitator Roles

To perform these roles, facilitators need to demonstrate the fundamental facilitation skills of:

Facilitating Skills	Guidelines
Attending Presenting self physically in a manner that indicates attention to learners	▪ Position body to face all learners ▪ Maintain appropriate eye-contact ▪ Move toward the learners ▪ Acknowledge learners
Observing Watching for cues to gain feedback on how learning activities are being received by learners	▪ Note learner's facial expressions, body position, and movements ▪ Observe learners' interaction patterns ▪ Formulate inference on learner's feelings/reactions ▪ Take appropriate action based on inference
Listening Obtaining verbal information and verifying own understanding of the information	▪ Stop talking and focus on the learner ▪ Take note of what is being said ▪ Demonstrate non-verbal signs to demonstrate understanding ▪ Paraphrase message and confirm if accurately understood
Questioning Asking questions and responding to questions from learners	▪ Ask clear, challenging but reasonable questions ▪ Use open-ended questions to stimulate discussion ▪ Provide positive reinforcement to learners who gave correct answers ▪ Maintain self-esteem of those who gave incorrect or incomplete answers ▪ Redirect learners' questions to class to stimulate thinking and participation ▪ Answer question directly if the facilitator is the only one who knows the answer[67]

Table 34. Fundamental Facilitation Skills

[67] Ibid.

Facilitation skills are applicable to both face-to-face and online delivery of LDIs. The main difference lies in the technology and platform that is used to deliver learning. The online platform makes it rather challenging to observe learners' reactions and sustain their interest in discussions and activities. Thus, facilitators need to effectively adapt to the online medium in interacting with learners, and familiarize themselves with the use of online application tools to enhance leaner engagement.

> Facilitators at times also need to manage challenging learner behaviors. In these situations, the first thing to do is to change the facilitator's mindset to recognize that challenging behaviors are rarely personal. Leaners have needs that trigger their behavior, and the task of the facilitator is to figure out this need and respond in a manner that will preserve a conducive learning climate, maintain the self-esteem of the concerned learner, and reinforce positive behavior change.
>
> *American Society for Training and Development (2008). Infoline: Tips, Tools, and Intelligence for Trainers. ASTD Workplace Learning and Performance Press.*

Facilitating SLEs

Structured learning exercises (SLEs) are widely used in adult learning. These are activities designed to enable learners to move through the different stages of the Experiential Learning Cycle and draw lessons and applications by reflecting on their experiences. SLEs are administered and processed using the Four A's (Activity-Analysis-Abstraction-Application) approach. This is aligned with Kolb's Experiential Learning Cycle theory.

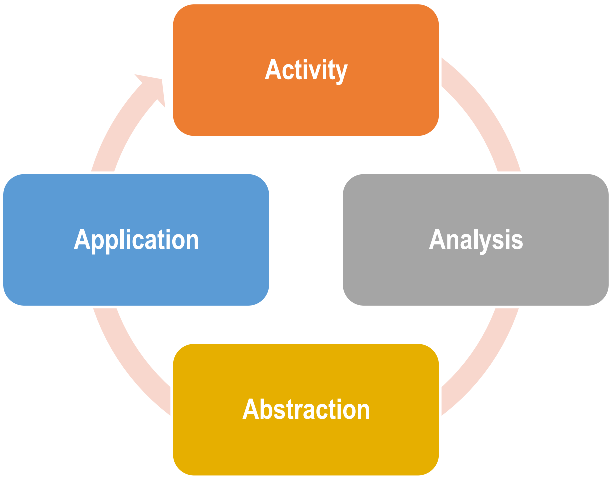


Figure 53. The 4As Experiential Learning Approach

The facilitator's tasks in each of the stages of the cycle are as follows.

Facilitator's Objective	Tasks
Activity	
Administer and manage the SLE so learners are engaged in the activity as planned	▪ Prepare all SLE materials, including process questions *Note: Ensure that questions are relevant to SLE's objectives so that learner responses can be used to segue from Analysis to Abstraction and Application* ▪ Set up space for activity ▪ Prime the learners for the activity ▪ Provide clear and complete instructions and ensure that these are understood ▪ Attend to the safety of learners, as needed ▪ Observe group process ▪ Ensure that "rules" of the SLE are followed ▪ Monitor time but adjust as needed to enable learners to complete their learning experience ▪ If activity is conducted asynchronously (for online learning), provide detailed written instructions on how to conduct the activity and what to report in the synchronous session
Analysis	
Guide learners in revisiting what happened during the activity and how the experience affected them	▪ Ask planned process questions and follow-up questions if needed *For online learning, request learning groups to report the highlights of their experience in the activity conducted during the asynchronous session.* ▪ Publish learners' responses accurately on an easel sheet or board *Note: Jamboard or Google Slides are options for online LDIs.* ▪ Engage as many learners as possible in analyzing the event
Abstraction	
Guide learners in generating insights and conclusions about their experience	▪ Ask planned process questions and follow-up questions if needed ▪ Summarize responses, synthesize emerging patterns, if any ▪ Draw out insights and articulate learning points ▪ Reinforce abstraction points through a presentation or lecturette on the relevant content areas
Application	
Guide learners in relating the SLE activity to the workplace by identifying similar situations, and how learning can be applied to real-life scenarios	▪ Ask planned process questions and follow-up questions if needed ▪ Assist learners in identifying and articulating concrete and doable application ▪ If appropriate, engage learners in action planning

Table 35. Facilitator's Tasks in 4As[68]

[68] Adapted from Asian Development Bank, (2018). KALAHI-CIDSS National Community-Driven Development Program Training Management Guidebook. ADB, Manila.

LMT Roles in LDI Delivery

LMT members perform basically the same roles in face-to-face and online (synchronous learning) conduct of the LDI, with nuances arising from the platform that is used in conducting learning activities. Table 38 below specifies the roles and corresponding tasks of LMT members in a face-to-face and online classroom set-up.

<table>
<tr><th>Role</th><th>Face-to-face</th><th>Online Classroom[69]</th></tr>
<tr><td>LMT Lead/
LDI Manager</td><td colspan="2">▪ Oversees the implementation of the LDI
▪ Decides on issues related to the implementation of the LDI</td></tr>
<tr><td>Subject Matter Expert (SME) / Presenter</td><td colspan="2">▪ Delivers the presentation on assigned topic/s
▪ Encourages interaction among participants through planned activities and questions
▪ Shares and navigates presentation materials, as preferred</td></tr>
<tr><td>Facilitator</td><td colspan="2">▪ Introduces the LSP and LMT
▪ Conducts unfreezing activity and energizers
▪ Guides learners in setting norms
▪ Provides LDI overview
▪ Conducts Management of Learning (MOL) and integration activities</td></tr>
<tr><td>Moderator</td><td colspan="2">▪ Identifies and highlights themes in discussions
▪ Recognizes ideas contributed by learners
▪ Traffics flow of questions and comments during open forum[70]</td></tr>
<tr><td></td><td>▪ Posts questions to be answered at a later time in the Parking Lot[71]</td><td>▪ Monitors questions and comments from learners posted in the chatbox or Q&A tool
▪</td></tr>
<tr><td rowspan="2">Assistant</td><td colspan="2">▪ Launches Web-based learning applications (e.g., Mentimeter, polls, etc.) used by the SME/presenter
▪ Shares and navigates presentation and other learning materials (if not done by SME/presenter)
▪ Responds to learners' questions related to the learning technology and logistics</td></tr>
<tr><td>▪ Distributes handouts, templates, and other learning materials</td><td>▪ Manages the chat box and relays messages to learners, PMT or LSP as needed
▪ Posts links to handouts, templates, and other information in the chat box
▪ Opens and closes breakout rooms</td></tr>
</table>

[69] Adapted from Razza Consulting, (n.d.). Lecture Notes on "Designing and Managing Online Learning"
[70] Burch, J.R. (2019). Moderation Tips for Online Learning. Training Industry website. https://trainingindustry.com/articles/e-learning/moderation-tips-for-online-learning/
[71] A board that is used to capture ideas and questions that should be followed up or answered later.

Role	Face-to-face	Online Classroom[69]
Technical Support		▪ Monitors the platform to ensure that it is working properly ▪ Attends to technical issues that arise during the learning session ▪ Provides information on technical aspects of the LDI
Documenter	▪ Records LDI highlights and outputs	

Table 36. LMT Roles in LDI Delivery

It is important to note that this matrix does not imply that there should be a one-to-one relationship in role assignment. LMT members can perform multiple roles depending on their competency and workload as determined during team mobilization. It is essential though that all tasks are performed efficiently during the conduct of the training. Moreover, the roles highlight that an LDI, whether face-to-face or online, cannot successfully be implemented by a one-person team and thus, team composition should be given due consideration in planning.

Conducting Debriefing Sessions

A debriefing session is a structured process for reviewing actions and results of LDI activities to learn from them, affirm successes, and plan to address mistakes and challenges encountered. Its objective is to understand *why* things happened and explore what to repeat and what to change.[72]

Debriefing is conducted at different points in the LDI for the following purpose.

- End-of-day debriefing: Done to continuously plan for improvement while the LDI is in progress
- End-of-LDI debriefing: Conducted after the end of the LDI to evaluate the results or outcomes of the LDI

Aside from these purposes, debriefing helps increase the effectiveness of the team, both individually and collectively, by improving communication, promoting shared values and practices, and fostering team learning.[73] All LMT members are expected to attend these sessions, including the LSP.

The spectacles of experience; through them you will see clearly a second time.

- *Henrik Ibsen*

[72] Adapted from Sundheim, D. (2015). Debriefing: A Simple Tool to Help Your Team Tackle Tough Problems. Harvard Business Review. https://hbr.org/2015/07/debriefing-a-simple-tool-to-help-your-team-tackle-tough-problems; Bergholtz, S. (n.d.) The Debrief- An Essential Tool for Project Evaluation. https://www.brainspores.com/debrief-essential-tool-project-evaluation-research/

[73] Tannenbaum, S. & Cerasoli, C. (2013). "Do team and individual debriefs enhance performance? A meta-analysis". Human Factors.

There are four steps to conducting an effective debriefing.[74]

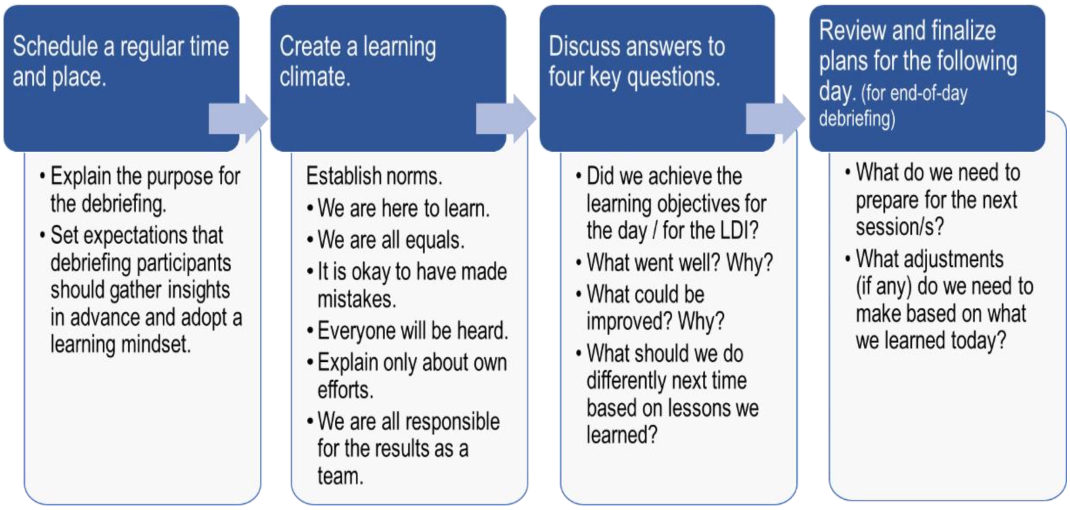


Figure 54. LDI Debriefing Process

Remember that it is important to document the results of debriefing sessions, especially the lessons learned and recommendations for improvement, for immediate or later reference. This report forms part of the LDI Completion Report to make sure that the information is used to guide planning for subsequent runs of the LDI.

Supplementary Notes on LDI Delivery

- Engage learners early by stating the WIIFM ("What's in it for me?") at the start of the LDI.75 When learners understand how their performance will improve after the LDI, they will be more ready to transfer what they learned on the job.
- Monitor attendance and assist learners in addressing issues that may hinder their participation in LDI activities.
- Demonstrate care for the learners. Check on their progress, affirm accomplishments, solicit feedback, and respond to their concerns to the extent possible. Inform them about requests that cannot be accommodated and reasons why. Practice inclusive communication.

[74] Adapted from Sundheim, D. (2015). Debriefing: A Simple Tool to Help Your Team Tackle Tough Problems. Harvard Business Review. https://hbr.org/2015/07/debriefing-a-simple-tool-to-help-your-team-tackle-tough-problems
[75] SHIFT eLearning.com (n.d.) Improving Knowledge Transfer in Your Organization in 3 Stages. *SHIFT eLearning Blog*. https://www.shiftelearning.com/blog/improving-knowledge-transfer

Inclusive communication promotes positive and effective interactions among learners by fostering a sense of belonging and respect. Following are some tips to consider.[1]

- Practice reflective listening. Ask open questions to clarify and summarize what was said or asked to make sure you and other learners understood correctly.
- When learners are having difficulty in expressing their ideas, be patient and allow them to complete what they are saying.
- Make sure that only one learner is speaking at a time, and that he or she can be clearly heard by everyone. Repeat questions and comments if needed.
- Give both oral and written instructions, expressed in a language that can be understood by all.
- Adapt your communication to the special needs of learners. For example, if they have interpreters, pace your delivery to allow them to catch up. Read aloud when there are learners with vision or hearing impairment.
- Use inclusive language. (Refer to pages 113 – 115 for details.)

- Prepare critical incident reports to document events that disrupted the learning process and/or affected the learners' ability to fully engage in the LDI. Give learners feedback on how related issues are being or were addressed.
- Ensure that the learners' LAPs are approved by managers/supervisors. This will encourage learners to consult with them and managers/supervisors to be actively involved in developing the plan.

➲ LDI Post-Delivery

Upon completion of LDI delivery, the LMT focuses its efforts on the implementation of learners' LAPs. It also attends to LDI reporting and closure requirements. The following are the key tasks in each of the LDI management areas.

Program Management	Team Management	Resource and Welfare Support Management	Learning Management
▪ Coordination with learners' managers/supervisors on LAP implementation concerns	▪ LMT & LSP performance evaluation and feedback	▪ Reporting on welfare support, logistics, etc. ▪ Coordination with Accounting regarding payment	▪ Provision of support to learners and managers/ supervisors in workplace learning application activities

Program Management	Team Management	Resource and Welfare Support Management	Learning Management
▪ LDI evaluation, including end-of LDI debriefing ▪ Post-LDI report preparation ▪ Preparing requirements for crediting of CPD units		of suppliers and service providers ▪ Financial report preparation	

Table 37. Key Tasks in LDI Post-Delivery

An LDI could produce outstanding learning, but still fail to create value if the process breaks down in the learning transfer step.

Adapted from The Six Disciplines of Breakthrough Learning. https://the6ds.com/wp-content/uploads/2017/03/Introduction-to-the-6Ds-3.0.pdf

The LMT, learners, and their managers/supervisors partner in the implementation of the learners' LAP.

- Managers/supervisors provide the needed opportunity and support in the workplace for the conduct of activities identified in the plan. They also allocate resources as needed.
- The LMT helps learners and their managers/supervisors by enhancing their ability to facilitate the transfer of learning. It also provides assistance to ensure LAP implementation, as needed.
- Learners implement the LAP and update their managers/supervisors and the LMT on their progress and on factors that facilitate and block their learning application in the workplace.
- Conduct the end of LDI debriefing session within the week after LDI completion when observations and feedback are still fresh in the memory of LSPs and LMT members.

In summary:

- ✪ The LDI is conducted in the Implementation phase using the learning resource materials developed to address learners' competency development needs and support transfer of their learning in the workplace.
- ✪ Four clusters of overlapping tasks are undertaken during implementation: Program Management, Team Management, Resource and Welfare Support Management, and Leaning Management. These tasks are carried out before, during, and after the delivery of LDIs, regardless of whether these are delivered face-to-face, online, or though blended learning.
- ✪ The LMT, LSPs, managers/supervisors, and learners perform specific roles in working together to ensure that LDIs achieve their competency development objectives and result in improvements in learners' performance on the job.
- ✪ The composition of the LMT is determined by the type of LDI, delivery mode, number of learners, and availability of resources. The roles and corresponding tasks are however well-established and need to be performed regardless of the number of LMT members. Thus, while multi-tasking may be necessary, LDIs, whether face-to-face or online, would be challenging if managed by a one-man team.
- ✪ Tasks in LDI implementation are mainly focused on facilitating the acquisition of learning through the conduct of the different LDI activities and provision of learning support mechanisms. There are major clusters of tasks involved: managing the learning journey, presenting content, and facilitating the learning process.
- ✪ The guidelines, roles and skills required in delivering LDIs apply to both face-to-face and online delivery. However, the remote setup in online learning makes it challenging to observe learners' reactions and sustain their interest in LDI discussions and activities. Thus, facilitators need master the online platform, be mindful and adapt to its limitations, and make full use of online tools available to sustain attention and engagement.
- ✪ It is good practice for the LMT to conduct debriefing sessions regularly at the end of the day while the LDI is in progress, and after its completion. This will provide an opportunity to assess LDI activities and results, determine what was done well and should be sustained, and make necessary changes or adjustments based on learning from mistakes and challenges encountered.

EVALUATION

This section of the L&D Guidebook will cover:

- Purpose and value of the Evaluation phase
- Scope and outputs of the Evaluation phase
    - Planning to M&E
    - Developing M&E tools
    - Conducting M&E
    - Analyzing M&E results
    - Preparing M&E reports
- Key roles in the Evaluation phase
- Evaluation process, guidelines, and standards

Robert is working with the design team in crafting the M&E Plan for the Course on Managing Change for PSWDOs. They are reviewing the Learning Results Chain from the LNA Report. The team members have started brainstorming on the elements of the M&E Plan as well as responsibilities and timelines in implementing the plan.

IX. Evaluation

Evaluation is a critical phase in managing LDIs. Its main purpose is to determine the effectiveness of LDIs, and whether performance and organizational objectives have been achieved.
While shown as the last phase of the ADDIE, elements of evaluation are integrated in all phases.

- **Analysis** determines the competency and performance baselines and sets objectives for the LDI.
- **Design** further refines learning objectives that become the basis for the learning methods, content, and other features of LDIs.
- **Development** includes the crafting of appropriate evaluation tools for different stages of the LDI.
- **Implementation** involves the use of tools to gather data about the LDI.

Figure 55. Evaluation Phase

For purposes of this guidebook, the term "monitoring and evaluation (M&E)" will be used to refer to processes in the Evaluation phase. M&E are two distinct but complementary processes. Evaluation makes use of monitoring data to analyze the effects and impact of LDIs.

Monitoring	Evaluation
• A continuous tracking of actual accomplishments against what was planned or expected. • Provides regular feedback and indications of progress towards intended results, and guides corrective actions	• A time-bound process of assessing achievement of objectives, and what facilitated or hindered success. • Provides information on lessons learned decision-making on future programs.

Figure 56. Monitoring and Evaluation[76]

A. Purpose and Value of the Evaluation Phase

The process of monitoring and evaluating LDIs:

- Provides information necessary to improve LDI design and execution

[76] United Nations Population Fund (2004). Programme Manager's Planning, Monitoring and Evaluation Toolkit. http://dmeforpeace.org/sites/default/files/UNFPA_Programme%20Manager%27s%20Planning%20Monitoring%20%26%20Evaluation%20Toolkit.pdf.

- Encourages a focus on results and alignment of LDI to organizational goals and objectives
- Enhances the probability of meeting learning goals and objectives as it heightens awareness and mindfulness on expectations from the LDI
- Reinforces accountability for delivering on LDI objectives
- Provides timely and meaningful information to decision-makers
- Promotes quality-orientation and continuous improvement
- Generates evidence to demonstrate the value of LDIs

B. Scope and Outputs of the Evaluation Phase

M&E of LDIs cover the following:

- Planning to M&E
- Developing M&E tools
- Conducting M&E
- Analyzing M&E results
- Preparing M&E reports

Key outputs of this phase include M&E Plans, and M&E Reports.

C. Key Role Players in the Evaluation Phase

The Evaluation phase requires the involvement of the following key players:

Key Player	Responsibilities
Learning Management Team (LMT) • Team Leader • Specialists with grounding on: ○ basic M&E processes and tools	• Formulates the LDI M&E Plan • Develops M&E processes and tools • Conducts M&E on target groups of learners • Prepares the M&E Report
Supervisor/ Manager	• Validates the LAP objectives of learners • Provides needed data on target learners' application of learning to the job, and improvements in competency and performance • Participates as respondent to M&E activities during the LAP implementation • Validates M&E results

Key Player	Responsibilities
Learner	• Formulate plan for workplace learning application • Participates as respondent to M&E activities
IT Specialist	• Provides technical assistance, as needed, in the setting up automated system for gathering, processing, and analysis of M&E data

Table 38. Key Players in the Evaluation Phase

D. Evaluation Process, Guidelines and Standards

Levels of Evaluation

The Kirkpatrick Four Levels of Evaluation has been used by many organizations as guiding framework for evaluating LDIs and is considered a gold standard of practice. The four levels are described as follows: [77]

Level 1 Reaction	• The degree to which learners find the LDI favorable, engaging, and relevant to their jobs
Level 2 Learning	• The degree to which learners acquire the intended knowledge, skills, attitude, confidence, and commitment based on their participation in the LDI
Level 3 Behavior	• The degree to which learners apply what they learned during the LDI when they are back on the job
Level 4 Results	• The degree to which targeted outcomes occur as a result of the LDI and the support and accountability package

Figure 57. Kirkpatrick's Four Levels of Evaluation

Level 1 focuses on the learner's experience of the learning environment during the LDI. It measures the extent to which learners find the elements of the learning environment conducive to learning, engaging, and job relevant.

Level 2 gauges whether learners gained the competencies targeted by the LDI, and in the process, built their confidence and commitment to apply these competencies when they return to their workplace.

Level 3 tracks whether learners are able to apply what they have learned to their job, and subsequently improved their performance. It likewise monitors mechanisms in the workplace that support and reinforce accountability for learning application.

Level 4 assesses the contribution of performance improvements to the goals and objectives of the office/group and organization.

[77] Kirkpatrick, James D.; Kirkpatrick, Wendy Kayser (2016). Kirkpatrick's Four Levels of Training Evaluation. ATD Press: Alexandria, VA.

The four levels follow a chain of logic in which effectiveness at one level increases the likelihood of achieving the next higher level. If learners find the LDI environment conducive to learning (Level 1), they are better able to acquire the targeted competencies from the LDI (Level 2). If they feel adequately equipped with the necessary knowledge, skills, and attitudes, the more likely they will practice what they have learned when they are back on the job (Level 3). If they are able to use their improved competencies, and perform better at work, they contribute to desired outcomes for their work units and organization
(Level 4).

Figure 58. Chain of Results in Evaluation

The four levels stress the importance of looking at LDIs, not as a single event, but a learning process that goes beyond the physical or online classroom. The real value of LDIs is demonstrated when it enables performance in the workplace and contributes to the goals of the organization.

This perspective echoes the thinking behind the *Six Disciplines of Breakthrough Learning (6D)* framework to "design the complete experience," "deliver for application," "drive learning transfer," and "deploy performance support." To produce higher levels of results in terms of performance, an LDI must not only include training sessions but also provide approaches to support and ensure learning application and performance improvement on the job. This implies the necessity of giving more attention and resources to measuring Level 3 which is key to achieving organizational outcomes at Level 4. It also necessitates closer collaboration with and active involvement of supervisors and managers who directly oversee the learner at work.

Up to 90 percent of training resources are spent on the design, development, and delivery of training events that yield … 15 percent on-the-job application. Reinforcement that occurs after the training event produces the highest level of learning effectiveness, followed by activities that occur before the learning event, yet each typically garners only 5 percent of the training time and budget.

Kirkpatrick, James D.; Kirkpatrick, Wendy Kayser (2016). Kirkpatrick's Four Levels of Training Evaluation. Association for Talent Development.

Figure 61 summarizes the key aspects of the Kirkpatrick model. These will be discussed in more detail in succeeding sections.

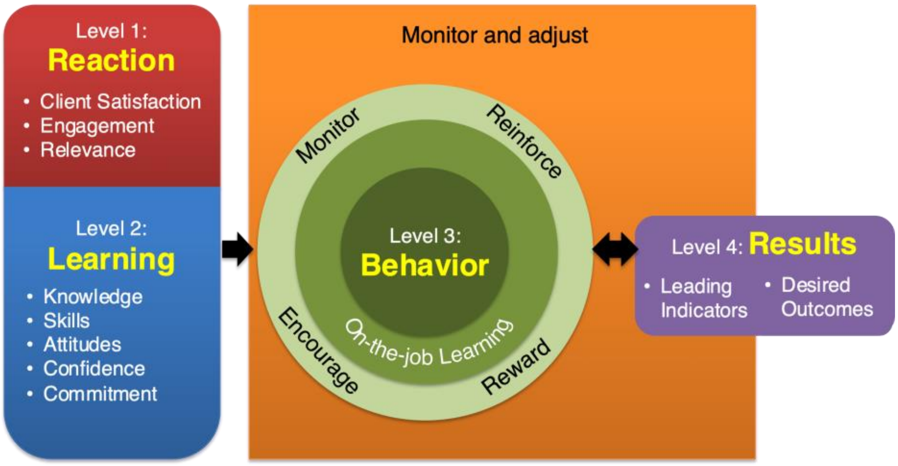


Figure 59. Kirkpatrick's Four Levels of Evaluation

LNA and Evaluation

The LNA sets the foundation for evaluation. The LNA results describe the competency and performance situation which the LDI is expected to change for the better. It is through the LNA that objectives and outcomes expected from the LDI are established and agreed upon among those who have a stake in the LDI's success.

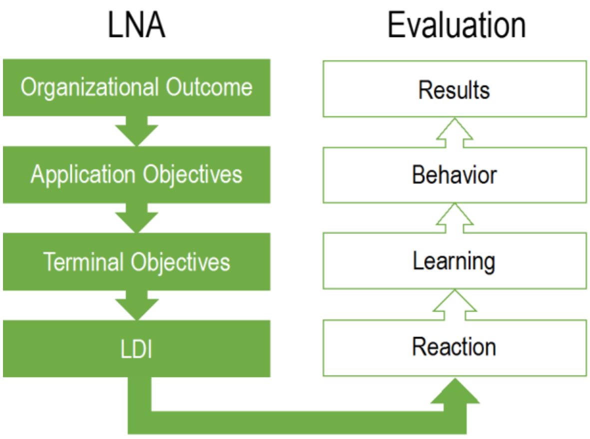


Figure 60. LNA and Evaluation

By the end of the LNA process, the four levels are defined in reverse. [78] The Learning Results Chain (Figure 35) formulated during the Analysis phase corresponds to the levels of evaluation and becomes the framework for the M&E of the LDI (Figure 62). The M&E process provides the chain of evidence of LDI success.

"Trainers must begin with desired results and then determine what behavior is needed to accomplish them. Then trainers must determine the attitudes, knowledge, and skills that are necessary to bring about the desired behavior(s). The final challenge is to present the training program in a way that enables the participants not only to learn what they need to know but also to react favorably to the program."

[78] Ibid.

Types of Assessments

M&E uses two broad types of assessments. Formative assessments check on whether progress is being made towards objectives while the LDI is ongoing. This allows the necessary steps to be taken to ensure it is on track. Monitoring is based on the principle of formative assessment. It can positively influence results as problems are addressed along the way, and the risk of failure is minimized.

Summative assessments are done at the end of the LDI and makes judgements on whether it has been effective in meeting program objectives.

Formative Assessment	Summative Assessment
• Conducted during program implementation • Validates and ensures that objectives are being met • Identifies gaps so that adjustments can be made when necessary to ensure attainment of objectives	• Conducted after program implementation • Determines whether program is able to deliver the results it is designed to accomplish • Makes conclusions about the merit and value of the program

Figure 61. Formative and Summative Assessment

M&E Consideration: Should all LDIs be evaluated?

To what degree should each program be evaluated? The short answer is that the degree to which a program is evaluated should match its importance or cost to the organization. Not all programs are of equal importance, so it would be wasteful to fully evaluate a less essential program, and risky to not sufficiently evaluate a program that is mission critical for the organization.

Kirkpatrick, James D.; Kirkpatrick, Wendy Kayser. Kirkpatrick's Four Levels of Training Evaluation (p. 39). Association for Talent Development.(2016)

A full-blown LDI M&E, including all four levels, is warranted when the program is:

- **Important to the organization.** The need is in a mission-critical function of the organization or is related to a major initiative.
- **Costly/expensive.** Undertaking the LDI requires a big investment in terms of budget, time, and other resources.

It is helpful to engage stakeholders in articulating on how important the LDI is to them and what information they would need to know about the results of the LDI.

Abbreviated methods may be used for less mission-critical LDIs to get useful information on the results of the intervention. For example, quick or short surveys may be conducted to check whether learners acquired the necessary skills, applied what they learned to perform better, and if the office or organization saw some gains from their improved performance.

LDI M&E Process

L&D M&E has two key steps: planning for LDI M&E and implementing LDI M&E which covers each of the levels of evaluation.

1. Plan for LDI M&E

Preparation is key to successful M&E. An M&E Plan not only guides the implementation of M&E activities but is a tool to help stakeholders gain a shared understanding of the objectives of the LDI, how M&E will be carried out, and how they will be involved.

> The M&E Plan is developed during the Design phase. The expected results at each level will influence LDI design in a way that maximizes desired improvements and outcomes.

The M&E Plan specifies the following information:

Figure 62. M&E Plan Sections

Objectives. These are the expectations at each level and can be derived from the LNA results and Learning Results Chain.

Indicators. These are measures that will signify whether objectives have been successfully achieved. While every LDI is different, there are some typical indicators for each level of M&E, as shown in Table 41. Indicators need to be tailored and must express the results expected of the LDI.

Level	Typical Nature of Indicators
Level 1: Reaction	• Favorable feedback from learners from learners on the LDI experience • Satisfaction rating of the LDI by learners
Level 2: Learning	• Improvement in learners' pre- and post-test scores • Learner outputs meeting quality criteria • Demonstration of skills meeting standards

Level	Typical Nature of Indicators
Level 3: Behavior	• Achievement of objectives of a LAP • Observed improvement in learner performance in the job area targeted by the LDI
Level 4: Results	• Improvement in group, work unit or office performance • Improvement in organizational performance measures

Table 39. Typical Nature of Indicators at Each M&E Level

Methods and Tools. These are procedures and instruments for data collection. M&E uses methods and tools similar to those used in the Analysis phase. Some examples for each level are listed in Table 42. See Annex 29 for a description of each method.

Method	Evaluation Level			
	1 Reaction	2 Learning	3 Behavior	4 Results
Survey, interview, focus group discussion	✓	✓	✓	✓
Action Planning		✓	✓	✓
Observation		✓	✓	
Pre- and Post-Test		✓		
Simulation		✓		
Assessment of training outputs, work samples		✓		
Validation			✓	✓
Assessment of key office and organizational metrics				✓

Table 40. Evaluation Methods[79]

Data Sources. Table 43 shows examples of data sources for each level. More than one source may be needed to validate or cross-check data, or when data from one source is incomplete. Practical limitations such as time, budget, and human resources have to be considered in deciding to collect data from multiple sources.

Level	Possible Data Sources
Level 1: Reaction	• Learners' evaluation of training • LMT/LSP evaluation • LMT/LSP observation
Level 2: Learning	• Learners' self-evaluation • LMT/LSP evaluation • LMT/LSP observation • Learners' Outputs

[79] Adapted from Kirkpatrick, James D.; Kirkpatrick, Wendy Kayser (2016). Kirkpatrick's Four Levels of Training Evaluation. ATD Press: Alexandria, VA.

Level	Possible Data Sources
Level 3: Behavior	• Learners' self-evaluation • Supervisor's evaluation • Client feedback • Actual Work Outputs • LAP Outputs
Level 4: Results	• Management evaluation of group/office/organizational performance goals and objectives • Client feedback • Evaluation by third party

Table 41. Possible Data Sources

Timing. M&E is conducted at different points during and after the LDI. Table 44 presents the typical timeframes for measuring results at different levels. Periodic monitoring of progress is necessary, especially for Levels 3 and 4 when results will only manifest after a period of time.

Level	When to M&E
Level 1: Reaction	During and right after the training
Level 2: Learning	During and right after the training
Level 3: Behavior	Sometime after the training when the participants have had opportunity to apply their learning with relative independence, around 1 to 6 months after the training
Level 4: Results	Sometime after participants apply their learning and organizational/ department results are observed, around 3 to 12 months after the training

Table 42. Timing of Evaluation

Person/s Responsible. These are the people who need to make sure that M&E is conducted according to the plan. They identify issues and take action so that M&E activities are not hampered.

Level	Person/s Responsible
Level 1: Reaction	Learning Management Team, Learning Service Provider
Level 2: Learning	Learning Management Team, Learning Service Provider
Level 3: Behavior	Supervisor, Manager
Level 4: Results	Supervisor, Manager, Top Management

Table 43. Person/s Responsible

M&E is a partnership among stakeholders, i.e., LMT who run the programs, and managers/supervisors or organizations that send their employees to participate in the LDI. The degree of their involvement will depend on each stage of the program.

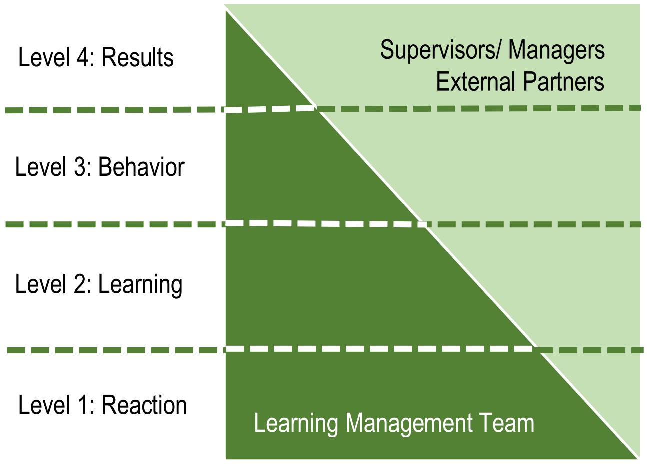


Figure 63. Roles in M&E of LDIs

The dark green triangle in Figure 65 depicts the bigger role played by the LMT in Levels 1 and 2 M&E since these occur during and right after LDI implementation. They are responsible for developing and administering M&E tools and other mechanisms to gather feedback from learners about the learning environment and experience, and checking learners' acquisition of learning. Managers and supervisors, including those from external partners, may not be part of the LDI but they can influence the outcomes at this level. Prior to the LDI, they can significantly shape the learners' mindset and disposition for learning by discussing the importance of the LDI and emphasizing accountability for applying their learning when they are back on the job.

Managers and supervisors play a key role in Levels 3 and 4 M&E which are conducted in the workplace. They monitor learners' changes in behavior and improvements in performance as a result of the LDI. They provide the necessary support so learners can successfully transfer their learning to their job. They also track how individual performance improvement is contributing to group, office, and organizational performance. At the same time, the LMT can influence success at Levels 3 and 4 by providing tools and mechanisms to help managers and supervisors create or structure learning application opportunities in the workplace and monitor progress. They share observations and feedback so managers, supervisors, and learners can take action to maximize outcomes.

Annex 30 provides a template for an LDI M&E Plan.

The M&E Plan for LDIs that are designed for external clients will be similar to the M&E Plan for LDIs for internal clients. Likewise, the M&E Plan for face-to-face, online, and blended LDIs will not be significantly different. They may differ in the indicators to be measured, especially at Levels 3 and 4, and this will influence the choice of methodologies and tools for data collection.

2. Implement M&E Plan

➲ Level 1: Reaction

There are three dimensions measured at Level 1: learner satisfaction, engagement, relevance.[80] Table 66 presents the description and elements of each dimension.

Level 1: Reaction **What to M&E**	**Learner Satisfaction**	**Engagement**	**Relevance**
	Degree to which learners feel positively about the training intervention and its elements	Degree to which learners are actively involved in and contributing to the learning experience	Degree to which learners will have the opportunity to use or apply what they learned on the job
		Elements	
	▪ Learning environment and welfare support (e.g., venue, accommodation, meals/ breaks, transportation, security and safety, staff support) ▪ Technology support (e.g., gadgets, apps, connectivity) ▪ Program duration and pacing	▪ Methodologies and activities ▪ Learning materials ▪ Delivery (LSP)	▪ Learning objectives ▪ Content ▪ Applicability

Figure 64. Dimensions of Level 1 Evaluation

Level 1 M&E makes use of both formative and summative assessment tools and mechanisms, as shown in Table 46. Formative assessment is particularly important as this enables immediate, real-time adjustments to the program to optimize learners' experience and facilitate their learning. Formative assessments are incorporated in the design and implementation plan of the LDI. Summative evaluations are useful in improving future programs.

[80] Ibid.

	Formative	Summative
Level 1: Reaction **How to M&E**	▪ Use of mechanisms to encourage timely feedback from learners, such as Message Boards, Suggestion Box, Freedom Wall, etc. ▪ Check-in activities to get a pulse on learner engagement ▪ Observation and documentation ▪ Daily debriefing sessions by the LMT ▪ Spontaneous or informal feedback from learners	▪ Post-LDI evaluation survey ▪ Post-LDI debriefing among LMT members
When to M&E	▪ During the conduct of the LDI	▪ At the end of the LDI ▪ For LDIs spread over long durations, e.g., consisting of several modules over a number of weeks, summative assessment may also be conducted at the end of each module

Table 44. Level 1 Formative and Summative Assessment and Timing of Assessment

Developing Level 1 Reaction Tool[81]

- Ensure that the tool includes items related to the three focus areas of Level 1 M&E: Learner Satisfaction, Engagement, and Relevance.
- Because a Level 1 tool measures learners' experience of the LDI, frame statements from the point of view of the learners, not the LMT or LSP. For example:

Trainer-/Facilitator-centered	Learner-centered
The methodologies are appropriate.	The methodologies facilitated my learning.
The resource person had mastery of the subject matter.	My learning was enhanced by the expertise of the resource person.
The LMT was effective.	My needs for assistance were addressed by the LMT in a timely manner.

Annex 31 provides sample list of learner-centered questions. Annex 32 gives a sample learner-centered Level 1 tool. It is also called a hybrid tool as it includes questions that ask learners to rate their level of confidence and

[81] Adapted from: Phillips, K, "Eight Tips on Developing Valid Level 1 Evaluation Forms." https://www.kirkpatrickpartners.com/Portals/0/Storage/8_Tips_Devel_Valid_Level1_Evals_article.pdf (Accessed 21 September 2021)

commitment to apply their learning, which are elements of Level 2 evaluation.

- Use single idea statements. For example:

✓	My learning was enhanced by the expertise of the resource person.
X	My learning was enhanced by the expertise and delivery style of the resource person.

- When creating a Likert response scale, space the numbers at regularly spaced intervals and descriptive labels only at each end. For example:

✓

1	2	3	4	5
Strongly Disagree				Strongly Agree

X

1	2	3	4	5
Strongly Disagree	Somewhat Disagree	Moderately Agree	Somewhat Agree	Strongly Agree

Research has shown that putting words on all points of the scale can render results less reliable as labels tend to overlap and can mean different things to different learners.

- Phrase items either as a statement or as a continuum. For example:

✓

The multi-media resources used during the sessions effectively facilitated my understanding of the program content.				
1	2	3	4	5
Strongly Disagree				Strongly Agree

✓

How effective are the multi-media resources used during the sessions in facilitating your understanding of the program content?				
1	2	3	4	5
Not at all Effective				Very Effective

X

Did the multi-media resources used during the sessions effectively facilitated your understanding of the program content?				
1	2	3	4	5
Strongly Disagree				Strongly Agree

The last example above requires a “yes” or “no” answer, and not a response along a continuum. The response scale does not match the question.

- Include items on learner confidence and commitment in the tool to supplement data that will be gathered from pre- and post-test in Level 2 M&E. This will make the tool a blended Level 1 and 2 evaluation that can provide additional insight on learners' acquisition of learning. For example:

✓	I feel confident about applying what I learned back on the job.
✓	I anticipate I will receive the necessary support to successfully apply what I learned.
✓	I am committed to applying what I learned to my work.

- Other tips:
  - Provide clear instructions on how to use the evaluation form, including the scale to be used.
  - Include spaces for learners to write specific comments.
  - Make it optional for learners to write their names on the evaluation form to encourage them to give candid and honest responses.

Always give learners enough time to complete evaluation form in class. Experts agree that "take-home" forms usually stay at home. If you save only the last few minutes of the training activity for evaluation, results will show tell-tale signs of the time crunch—hurried and incomplete responses. As part of program integration, set aside some time to review the program and discuss the evaluation form.

ASTD Infoline. Measurement and Evaluation (2008)

Processing Results of Level 1 M&E Tool

- For quantitative data, make use of basic statistics such as frequencies, percentages, and means or averages, as appropriate. Computing for mode and median may be helpful as well to check patterns in the data. Highlight high and low percentages, averages, etc. and find possible explanation by relating them to other sources of data such as feedback from learners during the sessions and observations gathered through the LMT debriefing sessions.
- For qualitative data, such as comments, cluster those with similar themes. Label each cluster, as appropriate. Relate them to other data sources, if needed.

Reporting Results of Level 1 M&E

- Include both formative and summative Level 1 M&E data in the report. The LMT can summarize formative data during its post-LDI debriefing and use them to support or augment learners' comments gathered from the post-LDI evaluation tool.

- Present numerical data from the tool in graphical forms to highlight patterns.
- Briefly discuss each of the components of the evaluation (e.g., objectives, relevance of content, methodologies, etc.). This can include an overall statement on the mean or average rating for the component, learners' comments and PMT observations.
- For qualitative data, quote one or two comments, if helpful in highlighting data. Avoid simply listing down the comments verbatim unless it is absolutely essential to present the exact words of a learner or learners.
- List down recommendations to address program components that need to be adjusted or improved. Table 47 presents decision questions that make use of Level 1 results. These may be addressed as well in the recommendations.

Level 1: Reaction **Use of M&E Results**	**Formative**	**Summative**
	▪ What adjustments do we need to make on: o Delivery/facilitation? o Mechanisms for better learner engagement? o Technology support? o Welfare support to learners?	▪ What enhancements do we need to do on: o Program design? o Learning materials? o Welfare and other support to learners? ▪ Should we engage the same o LSP? o Supplier of venue, meals, etc.?

Table 45. Uses of Level 1 M&E Results

➲ Level 2: Learning

Level 2 M&E measures the degree to which learners acquire the intended knowledge, skills, attitude, confidence, and commitment based on their participation in the LDI.[82]

[82] Kirkpatrick, James D.; Kirkpatrick, Wendy Kayser (2016). Kirkpatrick's Four Levels of Training Evaluation. ATD Press: Alexandria, VA.

Level 2: Learning **What to M&E**	**Knowledge**	Degree to which learners know certain information	*"I know it"*
	Skill	Degree to which learners know how to do something or perform a certain task	*"I can do it right now"*
	Attitude	Degree to which learners believe it will be worthwhile to implement what is learned from the LDI on the job	*"I believe this will be worthwhile to do on the job"*
	Confidence	Degree to which learners think they will be able to do what they learned from the LDI	*"I think I can do it on the job"*
	Commitment	Degree to which learners intend to apply the knowledge and skills they learned from the LDI to the job	*"I will do it on the job"*

Table 46. Dimensions of Level 2 M&E

As the learning process progresses during the LDI, various methods and mechanisms for formative assessment are used to check whether learners are able to absorb the learning points covered and ensure that session and enabling objectives are met. Summative assessments at the end of the LDI determines the overall improvement in learners' knowledge, skills, and attitudes.

	Formative	**Summative**
Level 2: Learning **How to M&E**	▪ Learners' participation in discussions and management of learning activities ▪ Direct feedback from learners ▪ Learners' outputs ▪ Observations of LMT and LSP ▪ Activity-based mechanisms, e.g., role plays, simulations, demonstrations ▪ Learning checks, e.g., pop quizzes, competitive quizzes, learning polls and maps ▪ Learning reflections activities ▪ Learning journal or diary ▪ Other mechanisms used in Level 1 formative assessment may be used here as well	▪ Learners' direct feedback ▪ Learners' performance ▪ Full program review by the LMT/LSP ▪ Program integration activities ▪ Quality of learners' outputs ▪ Pre- and/or post-LDI test (i.e., written or skills demonstration) ▪ post-LDI evaluation form that includes Level 2 items (i.e., level of confidence and commitment to apply learning)
When to M&E	▪ During the conduct of the LDI	▪ At the end of the LDI

Table 47. Level 2 Formative and Summative Assessment and Timing of Assessment

Developing Pre- and Post-Tests[83]

- Revisit the objectives in the LDI-DIP, specifically the session level learning objectives. Note how the session objectives are stated as this would indicate how the questions should be formulated. For example:

Session Objectives	Possible Test Items
Differentiate the learning domains	▪ What learning domain requires practice to be developed? (Multiple choice type) ▪ Psychomotor learning domain involves recognition of specific facts, procedural patterns, and concepts that serve in the development of intellectual abilities and skills. (True or False)
Enumerate the learning domains	▪ The three learning domains are: Cognitive, Affective, and ___________. (Fill-in) ▪ The three learning domains are Cognitive, Affective, and Emotive. (True or False)

Table 48. Aligning Test Items and Learning Objectives

- Prepare a test plan based on the session objectives and topics to be covered. The test plan will ensure that all session objectives will be covered in the test. It will also guide the test developers in determining the number of test items for each session objective. The input of the LSP is helpful in preparing the test plan.

  Table 51 shows a sample test plan:

Session Objectives	Topics Covered	% of Items
▪ Differentiate the learning domains	Cognitive, Affective, and Psychomotor Learning Domains	10%
▪ Explain levels of learning objectives	Terminal or Performance, Enabling, and Session Objectives	10%
▪ Formulate terminal objectives following	ABCD Guideline in Formulating Terminal Objectives	20%
▪ Develop learner-centered session objectives	Developing Learner-centered Session Objectives	20%
▪ Identify and prioritize content areas under each session objective	Identifying and Prioritizing Program Content	20%
▪ Select appropriate methodologies to achieve session objectives	Deductive and Inductive Methodologies Application and Limitation of Methodologies	20%

Table 49. Sample Test Plan

[83] Adapted from: Adriano, C., Making a Perfect Fit, College of Education, University of the Philippines (2012)

- Choose the types of test items that will be included in the instrument. Although pre-and post-tests commonly use objective type of items, subjective type of items are better suited to measuring acquisition of higher-level cognitive ability or complex tasks.

Objective	▪ True or False	▪ Fill-in	▪ Matching	▪ Multiple Choice
Subjective	▪ Short Answer		▪ Essay	

Table 50. Types of Test Items

- Develop the test items. See Annex 33 for Guidelines on Test Development that includes a description of different test types, their uses and limitations, and tips for item development.
- Check the draft instrument against the test plan to ensure that items are aligned with learning objectives and all salient learning points are covered.
- Prepare an answer key for use of the LMT when scoring the tests.
- "Alpha test" the instrument (e.g., among LMT members) to check for clarity of instructions and items, level of easiness or difficulty of items, and the time required to accomplish the instrument. Get the testing participants' feedback on the instrument. Revise and finalize instrument and answer key.

An interactive way of scoring the post-test form is to do it openly right after the test is accomplished. Learners can exchange papers, and members of the class can be called one by one to read and answer the items. This will provide an opportunity to review key learning points and at the same time learners get immediate feedback on their scores.

- To increase the probability that majority, if not 100% of the learners will accomplish both the pre-and post-tests, the LMT can employ some measures:
  - Inform learners at the start of the LDI that learning assessments will be integrated in learning activities and at the end of the LDI.
  - Ensure that the pre-test instrument is administered before any learning inputs are provided. Learners who came in late should accomplish the instrument before participating in the sessions.
  - Allot sufficient time for learners to answer the pre-test and post-tests.
  - Administer the post-test instrument before closing program.

Processing Results of Level 2 M&E

- Use the answer key to check accomplished pre- and post-test forms. Get total scores for pre- and post-tests for each of the learners.

- Compute the "learning gain" of each learner, i.e., improvement between the pre- and post-learning assessment scores. Use the following formula:

$$\textbf{Learning Gain} = \left[\frac{\textbf{Post-test Score minus Pre-test Score}}{\textbf{Maximum Score minus Pre-test Score}}\right] \textbf{X 100}$$

For example: Pre-test score = 15, Post-test score 28, maximum score = 30

(28 – 15)/(30 – 15) = (13/15) x 100 = .867 x 100 = 86.70% ⟵ Learning Gain

- Average gain score for the entire class can be computed adding learning gain scores of all learners divided by the number of learners. Learning gains give an indication if follow-up interventions may be necessary for specific learners or for the group on what learning areas.
- Compute also the learning gain scores per item of the post test. This will indicate the areas in which learners had the most improvement and where they encountered difficulty. Use this data as input in reviewing the LDI design and delivery.
- Relate results to the two other Level 2 dimensions (Confidence and Commitment) from the Level 1 M&E tool and include these in the analysis.

Reporting Level 2 M&E Results

- Include both formative and summative Level 2 M&E data in the report. The LMT can summarize formative data during the post-LDI debriefing and use them to support or augment learners' scores on the pre-test and post-test.
- Summarize results in graphical form to see patterns in the data.
- Briefly discuss pre-test and post-test performance and overall learning gain scores.
- Present analysis of learners' performance on learning areas (item analysis). Augment or support with formative data gathered from learners or LMT observations.
- Discuss learners' rating on Level of Commitment and Level of Confidence. Summarize reasons cited by learners with relatively low rating.
- Provide recommendations to address low scores on specific learning areas.
- Table 53 presents decision questions that make use of Level 2 results. These may be addressed as well in the recommendations.

Level 2: Learning **Uses of M&E Results**	Formative	Summative
	▪ What adjustments to the program design, content, delivery, and/or learning materials are necessary to address emerging needs of learners and achieve learning objectives?	▪ What adjustments to program design and implementation need to be made to improve learners' achievement of objectives in future programs? ▪ What support mechanisms can be provided to augment or reinforce learning acquired from the physical/ online classroom?

Table 51. Uses of Level 2 M&E Results

➲ Level 3: Behavior

Level 3 M&E finds learners back on the job with competencies acquired from the LDI. Two dimensions are measured at this level.

Level 3: Behavior **What to M&E**	**Critical Behaviors**	The few specific actions which, if performed consistently, will have the biggest impact on results
	Required Drivers	Processes and systems to reinforce, monitor, encourage, and reward performance of critical behaviors

Table 52. Dimensions of Level 3 M&E

Critical behaviors correspond to the application objectives formulated in the Analysis phase and refined during the Design and Implementation phases in collaboration with the learners' supervisors/managers. Application objectives describe the specific, observable, and measurable actions that are necessary to bring about performance improvements.

Required drivers are the set of support and accountability mechanisms that facilitate the demonstration of critical behaviors. These mechanisms have likewise been identified in the Analysis phase and made more specific during the Design and Implementation phases. They need to be monitored and evaluated so they continue to sustain or increase the likelihood of achieving application objectives.

Seventy percent of the time, when participants fail to consistently perform desired behaviors on the job, it is due to factors in the work environment.

2006 ASTD State of the Industry Report in James D.; Kirkpatrick, Wendy Kayser. ROE's Rising Star. Training and Development. (2010).

The formulation of a LAP is one of the key mechanisms for Level 3 M&E. Formative assessment involves tracking the progress of LAP implementation within an agreed time period. At the end of this period, achievement of WLAP objectives will be assessed.

Level 3: Behavior How to M&E	Formative	Summative
	▪ LAP implementation survey ▪ Interview/ FGD with learners and supervisors ▪ Observation of learners at work ▪	▪ LAP completion survey ▪ Interview/ FGD with learners and supervisors
When to M&E	▪ Within the agreed timeframe of learning application	▪ At the end of learning application period

Table 53. Level 3 Formative and Summative Assessment and Timing of Assessment

Developing Level 3 M&E Tools

- When a LAP is a component of an LDI, two tools need to be developed for Level 3 M&E: the LAP Monitoring Tool, and the LAP Completion Report. These are tools accomplished by individual learners, or group of learners who are implementing group LAP, as well as their supervisors.

- The LAP Monitoring Tool is designed to capture the progress of LAP implementation. The LAP should at least be monitored once, around the midpoint of the implementation period. Monitoring may be done more than once if the LAP during is longer. The tool gathers the following information:
    - LAP status and levels of completion
    - Accomplishments so far vis-à-vis the LAP objectives
    - Degree of application of critical behaviors
    - Factors that helped and hindered LAP implementation
    - Insights or lessons learned from implementing LAP

- The LAP Completion Report is accomplished when the LAP is completed, and includes the following information:
    - Most significant accomplishment of the LAP
    - How accomplishment contributed to office objectives
    - Degree of application of critical behaviors
    - Factors that helped and hindered LAP implementation
    - Insights or lessons learned from implementing LAP

- For LDI without a LAP, a simpler structure for workplace application may be set up and follow up interview or FGD may be conducted. Sample questions include:

- How are you currently using what you learned during the LDI?
- What positive outcomes are you seeing as a result of what you are doing?
- What else do you need to successfully perform the skills you learned in the LDI while on the job?
- If you are not using the skills you learned during the LDI, what are the reasons?
- Describe any challenges you are experiencing in applying what you learned to you work, and possible solutions to overcome them.

Processing Results of Level 3 M&E

- For quantitative data, make use of basic statistics such as frequencies, percentages, and means or averages, as appropriate. Computing for mode and median may be helpful as well to check patterns in the data. Highlight high and low percentages, averages, etc. and find possible explanation by relating them to other items in the tool and other sources of data such as feedback from learners and supervisors.
- For qualitative data, such as comments, cluster those with similar themes. Label each cluster, as appropriate. Relate them to other data sources, if needed.
- Analyze the data against the objectives established in the Learning Results Chain for the LDI.

Reporting Level 3 M&E Results

- The final overall LAP Completion Report compiles and integrates findings from the monitoring reports that were done during the LAP implementation period. While monitoring reports capture the LAP journey, the completion report:
    - Reviews the whole experience of LAP implementation
    - Analyzes trends and patterns in LAP implementation
    - Draws conclusions on:
        - Whether the application of learning was successful in improving performance
        - Whether improved learner performance contributed to the performance improvement objectives of the office and organization
        - Whether the office/organization provided the required support needed to facilitate success
    - Makes recommendations for improvement

- Include in the report a summary of the results achieved by the LDI. Figure 68 provides a template for a Learning Results Chain Worksheet, a “snapshot” type of a report. It draws attention to the most significant accomplishments and contributions of an LDI.

- Note however that this is a blended Level 3 and Level 4 template, i.e., it also captures results at Level 4, specifically, Office Performance Improvement and Organizational Outcome. Since achievement of Level 4 outcomes takes time, only progress towards Level 4 can be reported, if any. More on this in the next section on Level 4.
- Level 3 M&E results support the following decisions during and after the workplace application component of the LDI, and are addressed in the recommendations in the overall LAP Completion Report:

Level 3: Behavior **Use of M&E Results**	Formative	Summative
	▪ What adjustments can be made to improve the support provided to workplace application of learning? (e.g., supervisor involvement, coaching, job aids, helplines, work review, rewards and recognition, etc.)	▪ How can we improve the support provided in the workplace for application of learning for similar programs in the future?

Table 54. Uses of Level 3 M&E Results

Level 4: Results

Achieving results at Level 4 is the ultimate demonstration of the value of an LDI. It links the contribution of critical behaviors and individual performance improvement to organizational performance improvement. Level 4 M&E measures the following:

Level 4: Results **What to M&E**		
	Leading Indicators	Short-term observations and measurements suggesting that critical behaviors are on track to create a positive impact on desired outcomes
	Desired Outcomes	Broad and long-term organizational results at a high level and which reflect the reason why the organization exists

Table 55. Dimensions of Level 4 M&E

It is not always easy to draw a direct line between an LDI and organizational outcomes, but it is important to find even a broad alignment of the LDI with high level results. It is then necessary to identify leading indicators or more immediate results that can tell us that critical behaviors are adding value to the chain of results towards higher goals.

Achievement of leading indicators can occur earliest in the context closest to learners, and that is the group, work unit, or office to which they belong. If critical behaviors are demonstrated successfully and job performance improves, then it is hoped that this will help improve office performance as well.

Formative and summative assessment of Level 4 are closely linked to Level 3 evaluation. As shown in Figure 67, it is possible that while learning application progresses and demonstration of critical behaviors improve, achievement of leading indicators and desired outcomes also begin to occur. That is why a blended approach to evaluation of Levels 3 and 4 is appropriate.

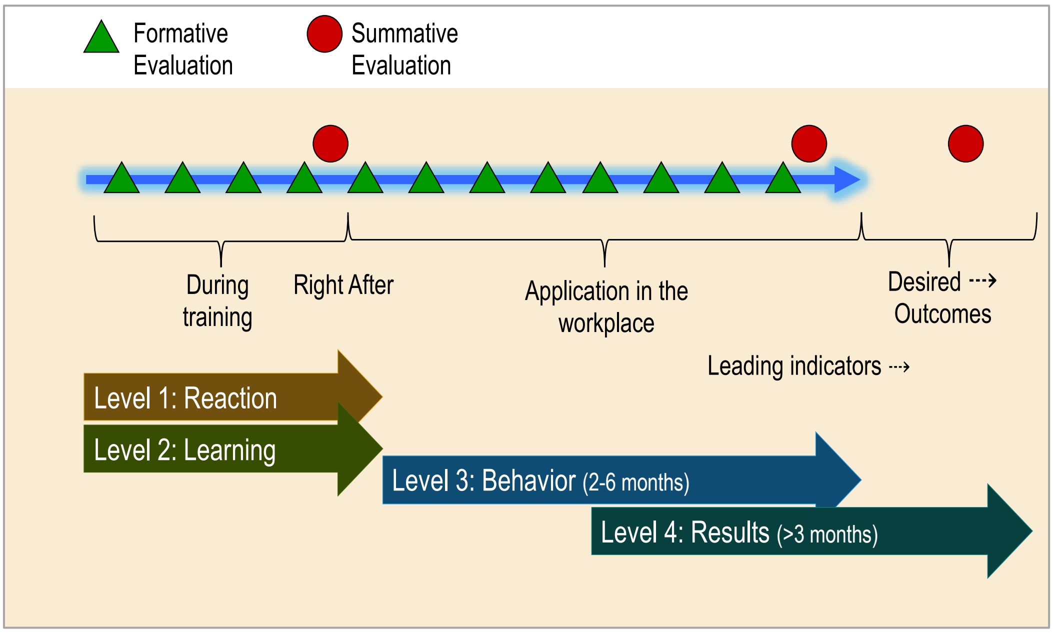


Figure 65. Summative and Formative Levels 3 and 4[84]

Methods and tools for collecting Level 4 data mostly rely on existing organizational performance monitoring and measurement processes (Table 58). The LMT will rarely have to collect data for Level 4, but they need to have access to the data in order to analyze and establish possible links and contributions of LDIs. It is for this reason that the involvement of supervisors/ managers from the start is crucial. They determine that the specific M&E data that are important to them and data sources are identified, and that they are committed to make data available to the LMT at the appropriate time.

Apart from this, the monitoring of LAPs in Level 3, which includes eliciting data on emerging office improvements, has already begun the process of gathering evidence of results that can be attributed more directly to learning application and improved individual performance. Those are Level 4 data.

[84] Adapted from Department of Education (DepEd) Learning and Development System Manual (2019). Basic Education Sector Transformation Program, Australian Government Department of Foreign Affairs and Trade.

Level 4: Results	Formative	Summative
How to M&E	▪ Methods and tools used in the organization's performance monitoring and evaluation system, such as: ○ Office performance review ○ Office accomplishment reports ○ Program Review and Evaluation Workshop (PREW) ○ Others	
When to M&E	▪ Follows the organization's performance monitoring and evaluation processes/ cycle	

Table 56. Level 4 Methods and Tools

Summative evaluation at Level 4 is integrating all the evaluations made so far to make a conclusion on whether the LDI indeed added value to the organization. The LDI is "valuable" if the expectations jointly set by the LMT and management have been met.

Reporting Level 4 M&E Results

- The preparation of a Level 4 report can coincide with the reporting cycle of the organization. This is a major accomplishment report and needs to be presented to management.
- The Learning Results Chain Worksheet in Figure 68 is one way of presenting the LDI outcomes in a manner that can catch the attention of management and help them quickly grasp the significance of the LDIs contribution to the organization. Other visual presentations may be considered such as the use of dashboards, infographics, video testimonials, and others.
- Since reports have been provided throughout the implementation of the training program, especially during learning application phase, the final report on the LDI will have to be brief but substantial.
- The suggested final report on the LDI is a concise story accompanying the Learning Results Chain Report. It begins the narrative from the bottom section of the results chain and moves upwards to the different levels of results. Suggested content is as follows:
    - Brief background on the LDI
    - Needs addressed by the LDI (including the significant performance issues that triggered the need for the LDI)
    - Objectives of the LDI
        - Learning objectives (knowledge, skills, and attitudes that learners needed to acquire)

        - Critical behaviors learners were expected to demonstrate on the job (application objectives)
        - Expected results in terms of:
            - ✓ Office performance improvement
            - ✓ Organizational outcome to which training aimed to contribute
    - Results
        - Present an overall summary of results:
            - ✓ Most significant gains in critical behaviors/skills
            - ✓ Most important support and accountability mechanism that supported application of learning
            - ✓ Notable office improvements
            - ✓ Impact on organizational outcomes (if any at the time of reporting)
        - Elaborate on some examples cited on the Learning Results Chain. Create short stories that include:
            - ✓ What critical behaviors were demonstrated, and how did these improve the learner's performance? What helped?
            - ✓ How did the learner's performance contribute to improving office performance?
            - ✓ How did the office's performance contribute to organizational outcomes?

          (Note: Include quantitative data, when appropriate and available, in the overall summary and short stories.)
    - Lessons learned
    - Recommendations

- Management decisions that make use of Level 4 results are shown in Table 59, and recommendations along these lines can be incorporated in the report.

Level 4: Results **Use of M&E Results**	**Formative**	**Summative**
	• What adjustments are needed in the workplace to facilitate achievement of leading indicators?	• Was the program a worthwhile investment? • Would we invest in another program like this?

Table 57. Uses of Level 4 M&E Results

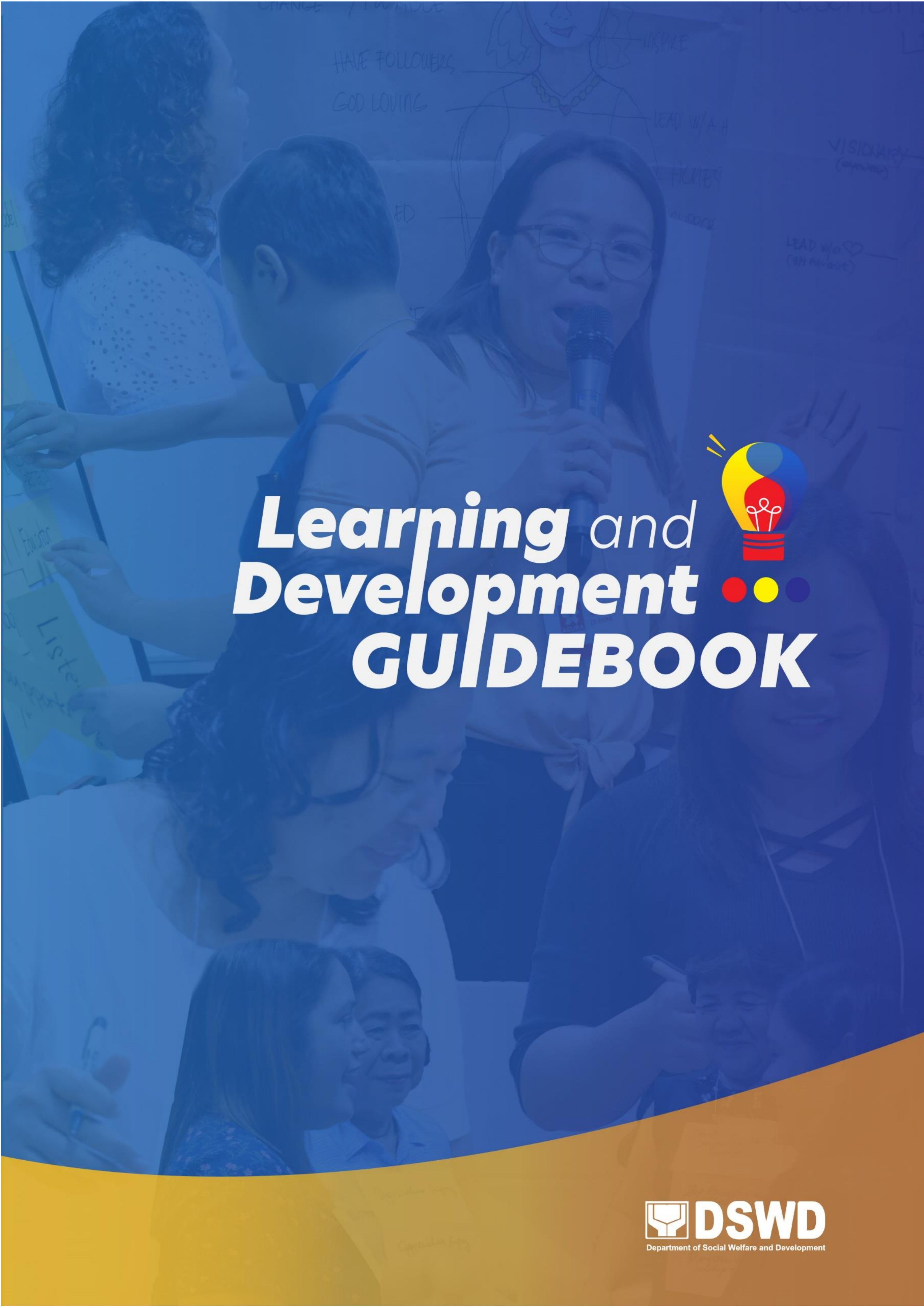
Learning Results Chain Report

Level 4	**Organizational Outcome**	Indicate organizational outcome to which the LDI aims to contribute	
	Office Performance Improvement	Cite examples of results in terms of office performance improvement, e.g., systems or processes improved, faster turnaround time	
Level 3	**Individual Performance Improvement**	Cite examples of results in terms of individual performance improvement, e.g., significant outputs produced by learners	
	Application Objectives • … • … • …	Critical Behaviors Demonstrated: Cite examples of actual demonstration of critical behaviors	Important Drivers/ Support Provided: Highlight the most helpful support and accountability mechanisms
	Learning and Development Intervention (LDI)	Title: Date of Implementation: Number of Learners: Offices Involved: Budget: Provide information about the LDI	

Figure 66. Learning and Performance Results Chain

In summary

- LDI M&E is embedded in all phases of the ADDIE. The Analysis phase establishes the outcomes and objectives which are captured in a Learning Results Chain that becomes the basis for the M&E framework for the LDI. The Design phase includes the development of the M&E Plan that guides how M&E is carried out at different stages of the LDI. M&E tools are created during the Development phase, and data are gathered using the tools during the Implementation phase.
- The Kirkpatrick Four Levels of Evaluation model provides structure to the M&E process and applies to face-to-face, online, and blended learning modes of LDI.
    - Level 1 or Reaction level measures whether learners find the LDI favorable, engaging, and relevant to their job.
    - Level 2 or Learning level gauges whether learners gained the targeted knowledge, skills, and attitudes, and built their confidence and commitment to apply these competencies back on the job.
    - Level 3 or Behavior level focuses on the extent to which learners are able to apply what they learned to their work and whether support and accountability mechanisms are in place to facilitate their learning application and performance improvement.
    - Level 4 or Results level assesses performance improvement contributed to the goals and objectives of the organization.
- While Levels 1 and 2 are important in the continuous improvement of LDI design and execution, it is in Levels 3 and 4 where the value of the LDI to the organization is demonstrated. It is at these levels where the LDI's real benefit to the organization is measured.
- Achieving the desired results from an LDI is a joint effort of the LMT, managers, supervisors, and learners. They can influence outcomes by using information generated through M&E processes. Through formative assessments at Levels 1 and 2, the LMT makes adjustments to the design and delivery of the LDI to enhance learners' experience and maximize acquisition of learning. Through monitoring, managers and supervisors check on learners' progress and provide support so that improved competencies translate to improved individual and organizational performance.



Learning and Development GUIDEBOOK

DSWD
Department of Social Welfare and Development