PAKISTAN'S VACCINES LOGISTICS MANAGEMENT INFORMATION SYSTEM

Training of Trainer's Manual

SECTION ONE

VACCINE LOGISTICS MANAGEMENT INFORMATION SYSTEM

SOFTWARE TRAINING SESSIONS

Table of Contents

SECTION 1

SOFTWARE TRAINING SESSIONS

BACKGROUND AND TRAINING COURSE OVERVIEW

The Government of Pakistan launched first web based Logistics Management Information System (LMIS) of Pakistan in July 2011. It has been expanded to report contraceptive and TB logistics data from all 143 districts of Pakistan. The web-based application has been owned and implemented by the federal and provincial/regional governments.

In May 2013, the USAID | DELIVER PROJECT was tasked by USAID Pakistan to strengthen the Vaccine Logistics System in Pakistan. Based on preliminary discussions, meetings with stakeholders including Ministry of National Health Services, Regulations and Coordination (MoNHSRC), UNICEF, WHO, World Bank, GAVI and the Provincial and Regional Governments, and Technical Assistance provided by Chris Wright (Senior Advisor) an appropriate understanding has been developed to design a comprehensive, sustainable and automated Vaccine Logistics Management Information System (vLMIS). The project is using the existing USAID Supply Chain Management Technical Assistance support model to strengthen Logistics and Inventory Management of Vaccines in a comprehensive manner including adaptation of existing LMIS to meet the needs of Logistics Information Management for the Vaccines and Cold Chain Equipment. The vLMIS will be implemented in two phases and the first phase of vLMIS will be implemented in 54 high risk districts across Pakistan.

This section introduces the trainees to the Vaccine Logistics Management Information System Software and its related Tasks and Activities. This Trainer manual contains the training sessions for the “Training on Pakistan Vaccine Logistics Management Information System (vLMIS)” The steps required to design, develop and deliver the “Training on Pakistan Vaccine Logistics Management Information System (vLMIS)” can be found in the “vLMIS Training Strategy”. The

Training Strategy outlines the objectives, needs, strategy, and curriculum to be addressed when training users on vLMIS.

For nationwide implementation of vLMIS, the Project needs to train the expected users of the system on its uses and functionality. The full course of training will provide skills and knowledge required to independently enter and upload data into web-based vLMIS. In addition, Managerial and Policy level staff needs to be oriented on basic aspects of vLMIS in order to buy-in their support in implementation.

The estimated number of staff to be trained or oriented at different levels of supply chain for phase-1 & 2 of vLMIS implementation is more than 4000. Approximately, more than 2500 users will receive training while 1495 managerial and policy staff will be orientated on vLMIS.

In Phase-1, a total of 926 individuals will receive training on data entry and analysis in vLMIS. In addition, a three to four hours training will be conducted for at least two vaccinators from 3,211 EPI centers included in phase-1. This training will be conducted by collaboration of LMIS operators and vLMIS Master trainers. The EPI center level training includes paper based reporting to districts on basic logistics indicators for all vaccines. The cost of EPI center level trainings (in both phase-1 & 2) will be exclusively funded through government resources.

Similarly, a total of 1,614 individuals will be trained on vLMIS in phase-2 when vLMIS will be scaled up to all 143 districts of Pakistan. Additional staff will be trained at federal and provincial level. The project will conduct training for newly included data entry sites in remaining 95 districts, while EPI center level trainings (7,500 additional EPI centers in scale-up) will be conducted by the government.

Timely and accurate data entry and submission of a monthly report at the district level is critical to the functioning of the vLMIS. The data collected from the vLMIS can then subsequently be used at each level of the supply chain to enhance informed decision making to meet vaccine demands. Utilization of the vLMIS will depend heavily on the level of understanding of those trained on its various functionalities. The project aims to identify the right individuals from the government departments and build their capacity in order to ensure sustainability and accuracy of vLMIS up to districts and sub-district levels.

SESSION 1: INTRODUCTION AND OBJECTIVES

Time: 80 Minutes

SESSION OBJECTIVES

- Know the overall Goal and Objectives of the Course.
- Know the fellow participants.
- Cite personal and group expectations from the course.
- Identify and explain the six Rights and purpose of Logistics Management.
- Individual are able to explain self-roles and responsibilities in implementing the objectives of Vaccine Logistics Management Information System at District level.

DOCUMENTS TO BE DISTRIBUTED

- Handout - 1.1: Self-introduction
- Handout - 1.2: Six rights of logistics system
- Handout - 1.3: Roll out Training schedules

MATERIALS REQUIRED

- Colored Cards to express expectation.
- Name Badge tags for both for participants and trainers
- Multimedia projector with Screen
- Flip Charts with Stand
- Marker Pen of different colors

PRESENTATIONS REQUIRED

- Session Objectives
- Training Goal and Objectives
- Training norms for participants and trainers during training session
- The Restaurant
- The Six Rights of Logistics Systems

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 1.1: WELCOME THE PARTICIPANTS (LECTURE)

Time: 05 Minutes

WELCOME the participants to the training and CONGRATULATE them for playing a key role in implementing the vLMIS. TELL them that the training team aims to impart skills and capacities to each of them so they can successfully implement web-based vLMIS at district level. TELL them that the automated reporting of logistics data, including inventory management of vaccines and cold chain equipment and vaccine consumption reporting, will improve vaccine logistics management drastically and will avert stock-outs of vaccines and cold chain equipment's at district and facility level. MENTION that this is the main focus of this course.

ACTIVITY 1.2: SELF INTRODUCTION; GET TO KNOW OF EACH OTHER (GAME)

Time 15 Minutes

MENTION that participants, coming from the same Province/District, know each other very well and that is quite natural. But others in this room may not be well known to each other accordingly. Other thing is that the participants and the training team members are not also known to each other. In order to make the course a success, both participants and trainers need to know each other well. TELL them that the training team thinks that prior to starting the course; everybody in this room should know each other well. Explain that this will help us work together better. ASK the participants what do they think? TELL that both the participants and trainers can be known to each other through a simple game.

Option 1

Ask participants to write three things about themselves on a piece of paper. Two of these items must be true and third must be a lie. The participants then introduce themselves one by one and tell their three characteristics in any order they wish. The group then has to identify which statement or characteristic is lie by voting.

Option 2

EXPLAIN the ground rules of the game.

ASK the participants and the trainers to stand in a circle with pen and paper. TELL that you will ask some questions and they will find the participants who fit into the answers. TELL that they will get 10 minutes time to identify the people and after 10 minutes they will tell the names of their identified people. ASK if the instructions of the game clear to them or not? If not, repeat the instructions.

Question-1: Whose name starts with A, S, M, N, B, K, J, K. L, R, P, S,or H?

Question-2: Who are working in District Health Department for five or more years?

Question-3: Who has worked as a LMIS trainer before?

Question-4: Who has worked as a trainer for three or more years?

Question-5: Whose youngest kid is three or less than 3 years?

Question-6: Who travelled the most to attend this training?

Question-7: Who’s Father / Guardian is still worried for his/her marriage?

Question-8: Who like singing?

Question-9: Who is good at playing cricket?

Question-10: Who knows how to swim?

Training team member will also participate in this game.

Training team may distribute these questions to the participants in the form of **Handout-1.1** (*Self Introduction*) if they like.

TELL that by participating in this game, I hope that we have known each other in respect of our personal liking, disliking, hobby, family condition, professional life, etc. We believe we shall pass our time here very nicely if we value and respect all these sort of things.

ACTIVITY 1.3: COURSE GOAL AND OBJECTIVES (LECTURE)

Time: 15 Minutes

TELL that now we shall discuss Goal and Objectives of the course.

Show slide # 1, **Title Slide**

Show slide # 2: **Training Goal**

ASK one of the participants to read the text: To get participants acquainted with the features of the vLMIS application as well as build institutional capacity towards independent and sustainable data entry, importing, exporting of data and data and report analysis through vLMIS for decision making.

ASK participants what do they understand about the statement. TELL participants that each of the vLMIS user has a critical role in enabling their department to independently enter, import and export data. TELL participants that vLMIS has valuable data the use of which depends on vLMIS user's ability to generate reports and graphs. The meaningful analysis can be of great help in preventing stock outs and formulating policy changes responsive to supply chain challenges pertaining to vaccines and cold chain equipment inventory management and vaccine consumption reporting.

Show slide # 3: **Training Objectives**

TELL participants that by the end of the training they will be able to:

1. Enter and upload vLMIS data with almost 100% accuracy.
2. Generate required reports and graphs.
3. Analyze and interpret reports and graphs.
4. Understand vLMIS problem solving approaches and how to contact helpdesk if needed.

ACTIVITY 1.4: PARTICIPANTS AND TRAINERS EXPECTATION (LECTURE, GAME, Q&A)

Time: 15 Minutes

TELL the participants that they have more practical experience of doing Logistics Management than the training team. But the training team has long experience of designing training, developing training curriculum and facilitating training courses. TELL that the course has been designed to implement putting together the practical experiences of participants and long training experience of trainers.

The training team expects that the course will be enjoyable and fruitful with the spontaneous participation of the participants. Everybody should take care so that the discussion does not become one sided. TELL that this course has been arranged in order to train participants in Vaccine Logistics Management Information System operation. The course will impart all required skills to successfully enter, upload and analyze logistics data through vLMIS. The success of web-based system depends highly on their data collection and compilation skills gained in the existing reporting mechanisms. The participants will take part in discussion in the light of their practical experiences, which will benefit them in their practical works later on.

TELL that participants might have some expectations out of this course. Similarly, the training team has also some expectations from the participants. The participants' expectation may be to know the unknown things of vLMIS or to know the things which they do not know well. The participants will work in small groups, to identify their expectations from this course. They will have five minutes time to list the expectations. DISTRIBUTE cards and marker pen to each group. Prior to starting work, TELL the groups that they will identify their expectations only related to vLMIS, and not any administrative or financial aspects, because the training team does not have anything to do in this respect.

At the end of allotted time, ASK each of the groups to tell their expectations. WRITE the key points of their expectations on the chart and paste in a suitable place in the training room so that everybody can see. The training team will do its best to fulfill all the expectations.

TELL that like participants, the training team has also some expectations. DISPLAY the expectations on Multimedia and ASK the participants if they agree to these.

CONCLUDE the discussion by saying that both the participants and training team will sincerely try to fulfill the expectations of each other.

Trainers Expectations

Course norms (Copy on the FLIPCHART and post in training room):

- Punctuality, both of trainers and trainees
- Respect each other's opinion and no side talking
- Speak one at a time
- Draw attention of trainer, by raising hand, if there is any question.
- Active participations from all
- Help each other, cooperative learning
- Equal participation and no domination
- Keep mobiles off or on silent mode. Only attend essential calls and that too after permission from trainers
- Friendly behavior with each other and have fun

After the participants have met in small groups and thought about their expectations, review the lists of expectations with the whole group. Record the main ideas coming from the participants. When this is finished, call attention to some of the specific sessions that will be presented during the course, during which the specific expectation will be covered. Also mention any expectations that were mentioned by several participants. Finally, be sure to note (using a red circle or checkmark) any expectations that are **not planned** to be covered during the course.

How to Handle Topics not Specifically Covered

Comment that while some of the topics mentioned in the expectations may not be covered through specific sessions, they may be discussed throughout the course in other topics (site one or two specific examples as appropriate).

Comment that from the self-introductions it was obvious that a lot of different expertise exists among the participants as well as the facilitators. Therefore, they should feel free to tap the expertise of others in the group. For example, if there are topics that will not be covered in depth during the course, it is possible that expertise exists among other participants. Comment that in any course such as this learning can take place between participants as from the facilitator to the participant, and participants should take advantage of this opportunity.

Mention also that due to time and other constraints, some topics simply will not be covered, but participants are free to discuss among themselves during breaks, lunches, or in the evenings.

ACTIVITY 1.5: TRAINING SCHEDULE (LECTURE/DISCUSSION)

Time: 15 Minutes

Distribute handout 1.3 Rollout Training Schedules to all participants.

Tell participants that different types of trainings have different schedules. Explain types of training, contents, participants and number of days for each type of training. Encourage participants to ask any question that comes to their mind after looking at the different schedules.

ACTIVITY 1.6 PURPOSE OF LOGISTICS RIGHTS (LECTURE/DISCUSSION)

Time: 15 Minutes

Show Slide 6 “The Restaurant”.

Tell participants we can gain a good understanding of what a supply chain needs to provide by looking at something as simple as a restaurant.

Ask participants in what way they think a restaurant is like a supply chain? Take a few comments from the participants. If any participants mention “central warehouse”, “transportation” or “service delivery point”, note the comment on flipchart. Otherwise, just affirm the comment made by the participant.

Comment that in a restaurant we can find the basic elements of any supply chain: the kitchen serves as the central warehouse, the waiters and waitresses are the transportation, and the tables are the service delivery points. The restaurant has a cold chain. (If applicable, remind the participants which of these elements were provided by the participants.)

Ask the participants to imagine what the purpose of a Restaurant supply chain is. The participants should respond from among:

- to get food to the customer,
- to serve the customer,
- to fulfill the customers’ expectations.

Ask participants to think back to the experiences that they have had eating in restaurants. What kinds of expectations do they have when they go into a restaurant?

If no participants respond appropriately, ask them what criteria they would use to choose a restaurant; what makes a “good” restaurant.

Note the participant responses on flipchart.

Examples will probably include the following:

- good quality food
- fast and efficient service
- friendly service
- reasonable price
- food served within a reasonable length of time
- fresh/delicious food

Review items not mentioned by the participants.

The purpose of a restaurant supply chain is the same as any other supply chain, including a supply chain that manages health commodities.

The Six Rights

Show and review Slide 7: The Six Rights of a Logistics System.

Tell participants that the purpose of a supply chain can be summarized by the rule of the Six Rights.

Note: Tell participants that they can find logistics rights in Handout 1.3

Go back to the flipchart where the participants' expectations of a restaurant were noted and relate each of those expectations to one of the Six Rights. Examples include:

- "Fresh food" would relate to "in the Right Condition,"
- "Food served within reasonable length of time" would relate to "at the Right Time."

Ask participants if there are any items on their list of expectations that do not fit in the list of the Six Rights.

All items should be under one of the Six Rights, or classified as not directly related to the purpose of a logistics system.

For example, ensuring a "tidy" or "clean" restaurant is not one of the purposes of the supply chain for providing the food products.

Right Cost

Ask participants if the "right cost" applies to supply chains where commodities are donated and/or given to clients for free. Allow participants to respond.

Cost is still a factor because there are still costs associated with delivering the product to the client (e.g., personnel, transportation, and storage).

The Six Rights are even applicable for products that are not in full supply. The only difference is that for non-full supply products, the Six Rights are met less frequently, usually because the "right quantity" cannot be supplied. However, all of the other rights would apply to those commodities, in whatever quantity available.

SESSION 2: VACCINE SUPPLY CHAIN

Time: 30 Minutes

SESSION OBJECTIVES

By the end of this session participants will be able to:

- Describe Pakistan's Vaccine Supply Chain System
- Describe the flow of information for Vaccines in Pakistan

MATERIALS REQUIRED

- Multimedia projector with Screen
- Flip Charts with Stand
- Markers and Pen of different colors

PRESENTATIONS REQUIRED

- Vaccine and Cold Chain Equipment Supply Chain
    - Summary
    - How Vaccines are Suplied/Demanded
    - vLMIS Users

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 2.1: INTERACTIVE PRESENTATION

Time: 30 Minutes

TELL participants that to understand vLMIS properly they need to have some basic understanding of the system it serves. Studying Pakistan's vaccine supply chain system enables us to understand the logistics environment we are working. They can relate the learning to the role vLMIS is playing in strengthening this system.

Show Title Slide and Slide 2 'Vaccine Supply Chain'. Ask participants to identify their own roles in the pipeline. Write the different roles in the supply chain on a flipchart. Ask participants to identify how these various supply roles are linked to each other. The participants should be able to share their role in the supply chain based on their experience.

Tell participants that the flowchart describes supply flow for vaccines and cold chain equipment for different stakeholders. The flowchart shows flow of vaccines from central or provincial to district and sub-district level.

EXPLAIN that the straight black arrows (pointed downwards) in flowchart indicate the flow of vaccines stock issue and receive while semi-rounded /circular arrows (pointed upwards) show the flow of stock return. The district reports are received by Provincial Store and vaccines are re-supplied to districts based on population based targets without considering the consumption data and stock balance.

Show **slide 3 'Vaccine Supply Chain – summary**. The supply of vaccines is summarized in this slide. Ask one of the participants to read the slide. Go back to the previous slide if needed to relate the summary with flowchart. Ask participants if they have any role in receiving vaccines from central or provincial EPI stores. Tell participants that in addition to supply of vaccines the roles and responsibilities are also connected through this flowchart and any break or hurdle in this supply chain will ultimately affect the availability to recipient.

Show **slide 4 'How vaccines are supplied / demanded**. Tell participants that The Central or Provincial Store supplies vaccines based on push system. In push system the vaccines are supplied based on population targets. For a pull system to work, the consumption data from all EPI Centers has to be recorded. The reports of the EPI Centers of health department are called Monthly EPI reports. These reports are consolidated at tehsil level by Assistant Superintendent Vaccination (ASV).

EDO Health compiles the monthly reports of all tehsils at district level. The consolidated EPI report of EDO is then shared with Provincial EPI Directorate.

Show **slide 5, 'vLMIS Users'**. Tell participants that flow charts gives an overview of various geographical level logistics related positions and their responsibilities pertaining to vLMIS in public sector. List all these categories on flip charts. Ask participants to list responsibilities under each category for all users. Ask participants to categorize various responsibilities each staff has. They may say:

- Stock Receive
- Stock Issue
- Consumption Reporting
- Reporting
- or Others

SESSION 3: BASIC LOGISTICS CONCEPTS

Time: 120 Minutes

SESSION OBJECTIVES

- To make participants understand basic and key logistics concepts including consumption, average monthly consumption and months of stock.
- To enable to calculate the aforementioned indicators for their own district.
- To make supply decisions based on these indicators.

DOCUMENTS TO BE DISTRIBUTED

- Handout (description of basic concepts)
- Exercise 1, 2 & 3
- Answer key for exercises

MATERIALS REQUIRED

- Flip Charts and Stands
- Multimedia Projector with Screen
- Markers and Tape
- Calculators

PRESENTATIONS REQUIRED

- Basic Logistic Concepts
- Key Logistics Concepts

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 3.1: INTRODUCTION TO BASIC LOGISTICS CONCEPTS

Time: 30 Minutes

TELL participants that once the data is uploaded it is visible worldwide and can be used for logistics decision and policy formulation. Stress the importance of utilizing data from district to national level. Emphasize that their role is not just limited to data entry and uploading, but they should be proactive in using this data for district based logistics management. Each vLMIS user MUST understand his/her role in analyzing and interpreting vLMIS data. TELL participants that in order to understand reports they must grasp some basic logistics concepts. The participants may already be aware of some concepts and the exercises contained in this session will refine them further. PRESENT and elaborate basic logistics concepts.

ACTIVITY 3.1.1: BASIC LOGISTICS CONCEPTS

- Opening Balance: Balance of Vaccines/products in doses/numbers at the start of the month.
- Received: Vaccines/products received in doses/numbers during the month.
- Dispensed: Vaccines/products in doses/numbers dispensed to end user during the month.
- Vials Used: No. of vials used during the month for dispensing of the vaccines.
- Unusable Vials: No. of vials expired/damage due to any reason.
- Closing Balance: Balance of Vaccines/products at the end of month.
- Closing Balance: Opening Balance + Received - (Vials used + Unusable Vials) x doses per vial.
- Nearest Expiry Date: Nearest Expiry date of vaccines/product s in existing stock.

ACTIVITY 3.1.2: KEY LOGISTICS CONCEPTS

ASK participants what they understand by consumption of vaccines. They may possibly reply that it is dispensing of vaccines at the facility level or issuance of vaccines to facilities by district store. The consumption is computed by issuance / dispensing of vaccines at the facility level to the clients. In our vLMIS we are using the facility level issued / dispensed to end users data as consumption data.

TELL participants that it is important to compute the average monthly consumption for forecasting and other policy decisions as consumption may vary from month to month due to various reasons. ASK participants on how they calculate their flour or other home requirements and how frequently they replenish those items. They may respond that every month they buy a month's consumption based on what has been consumed previous month. The vaccines requirements can also be estimated keeping this principle in mind, however the estimation has to be more accurate. For a relatively accurate requirement of next month or so, Average Monthly Consumption is computed. TELL participants that AMC is computed by taking the average of previous three non-zero months, i.e,

Average Monthly Consumption (AMC) = Last Three Non-Zero Months / 3

Non-zero months are those in which the reported consumption was not zero.

ASK participants that how they will estimate that how much time their current stock will last. They may respond that it will depend on future consumption. TELL participants that in order to estimate how much time their current stock will last they will calculate ‘months of stock’ (MOS). MOS will inform us the number of months’ time before all stock is consumed. The MOS is calculated by dividing the current Stock on Hand (SOH) by AMC

Months of Stock = SOH / AMC

ACTIVITY 3.2: EXERCISE – CONSUMPTION

Time: 30 minute

Give exercise one to all participants. ASK them to perform this exercise individually. TELL participants that they can do their calculations on calculator or excel sheet. GO around the hall to check if participants are having any difficulty in doing the exercise.

ASK participants to share their results. Compare the results with answer key and redo the calculation to make everyone understand how consumption is computed.

ACTIVITY 3.3 EXERCISE – AVERAGE MONTHLY CONSUMPTION

Time: 30 Minutes

Give exercise two to all participants. ASK them to perform this exercise individually. TELL participants that they can do their calculations on calculator or excel sheet. GO around the hall to check if participants are having any difficulty in doing the exercise.

ASK participants to share their results. Compare the results with answer key and redo the calculation to make everyone understand how average monthly consumption is computed

ACTIVITY 3.4: EXERCISE – MONTHS OF STOCK

Time: 30 Minutes

Give exercise three to all participants. ASK them to perform this exercise individually. TELL participants that they can do their calculations on calculator or excel sheet. GO around the hall to check if participants are having any difficulty in doing the exercise.

ASK participants to share their results. Compare the results with answer key and redo the calculation to make everyone understand how average monthly consumption is computed.

SESSION 4: MONTHLY REPORTING FORMATS

Time: 30 Minutes

SESSION OBJECTIVES

By the end of this session participants will be able to:

- Describe main features of the Monthly Consumption Reporting Form
- Describe the indicator utilized in the Monthly Consumption Reporting Form

DOCUMENTS TO BE DISTRIBUTED

- Handout 4.1 Monthly Consumption Reporting Format
- Handout 4.2 Exercise
- Handout 4.3 Answer Key

MATERIALS REQUIRED

- Flip Charts and Stands
- Multimedia Projector with Screen
- Markers and Tape
- Calculators

PRESENTATIONS REQUIRED

- Monthly Reporting Form EPI Centre
- Monthly Consumption Reporting Form
- Monthly consumption Report Form EPI Centre
- Indicators

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 4.1: MONTHLY CONSUMPTION REPORTING FORM

Time: 30 Minutes

TELL the participants that for this next activity they will have the opportunity to look at newly introduced Monthly Consumption Reporting Form for paper based reporting from Health Facility/ EPI Center.

Show Title Slide 1. Ask participants to recall what they learned from the earlier session on vaccine supply chain. The LMIS is depicted as the engine of supply chain management system. Pakistan does not have proper and adequate paper based LMIS systems for the Expanded Program on Immunization (EPI) of the Department of Health.

Show Slide 2, 'Description - 'Monthly Reporting Form-EPI Centre'. Tell participants that the monthly report is prepared by vaccinator of EPI Centre or union Council. The vaccinator collects and consolidates data of routine immunization of static and mobile and/or outreach vaccination teams and enters it in the monthly reporting form. The form has the provision of reporting data on childhood routine immunization, childbearing age (CBA) women routine Tetanus Toxoid (TT) immunization and stock position of vaccines and other logistics.

Tell participants that the initial portion of the report list information and targets of the particular EPI center or union council. The report also provides stock position of vaccines including used/issue data which could be used as proxy for consumption. The duly filled form is submitted either directly to EDO office or concerned Assistant Supervisor Vaccination (ASV).

Show **Slide 3**, '**Monthly Consumption Reporting Form'**. Ask participants to have a look at the newly introduced consumption reporting form and identify what data is required in this sheet. Ask participants what feedback they might have of going through this sheet. Encourage participants to point out deficiencies if any.

Show **Slide 4**, '**Description - 'Monthly Consumption Reporting Form-EPI Centre**'. Tell participants that the monthly consumption report will be prepared by vaccinator of EPI Centre or Union Council. The vaccinator collects and consolidates data of routine immunization of static and mobile and/or outreach vaccination teams and enters it in the monthly reporting form. The form has the provision of reporting data on consumption and stock position of vaccines and other logistics.

Tell participants that the report list information of the particular EPI Centre or Union Council. The report provides stock position of vaccines including consumption, vial used, unusable vials, Opening and closing balances and nearest expiry. The duly filled form is submitted either directly to EDO office or concerned Assistant Supervisor Vaccination (ASV).

Show slide 5, 'Indicators' Ask the participants about their concepts of indicator utilized in Consumption reporting format and describe these indicators briefly for their clarity.

SESSION 5: GETTING STARTED WITH VLMIS

Time: 45 Minutes

SESSION OBJECTIVES

At the end of the session participants will be able to:

- Tell purpose of vLMIS
- Identify various features / functions contained in vLMIS application
- Identify different Users, Geographical levels and their Roles

DOCUMENTS TO BE DISTRIBUTED

- User Guide
- Exercises
- Presentations

MATERIALS REQUIRED

- Laptops for each participant (with external mouse, Microsoft Office 2007, Internet explorer 8.0 or Firefox, Wi-Fi)
- Flip Charts and Stands
- Multimedia Projector with Screen
- Markers and Tape

PRESENTATIONS REQUIRED

- Why vLMIS
- Functions/Features of vLMIS
- User Roles
- User Types
- Accessing vLMIS
- vLMIS Homepage
- Logging into vLMIS

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 5.1: INTRODUCTION TO AND GETTING STARTED WITH VLMIS

Time: 60 Minutes

Open vLMIS Introduction and Getting Started with vLMIS ppt and project it.

Show slide # 2, **Why vLMIS**: TELL participants that the web-based Vaccines Logistics Management Information System has been designed to help, plan and manage the immunization resources and ensure that adequate quantities of vaccines are always available to meet demand at the right time, to the right place, in the right condition, in the right amount – No matter where they live.

EXPLAIN that the current web-based Vaccine Logistics Management Information System (vLMIS) is an extension of the Contraceptives Logistics Management Information System (contraceptive LMIS) and is designed to replace the current paper-based logistics information system that is being used for managing the vaccine distribution and logistics. The system brings in district and EPI-level reporting by aggregating facility-level data through paper-based reports. With a unified system for reporting and requisitioning, the vLMIS system is able to integrate information from all levels and sectors.

Show slide # 3 **Accessing vLMIS**: TELL participants that the web-based vLMIS can be accessed at http://lmis.gov.pk and clicking the vaccine tab. The web-based Vaccine Logistics Management Information System (vLMIS) is easy to use and contextualized to fit local stakeholder's structure.

Show slide # 4 **Functions / Features of vLMIS:** TELL participants that they are provided with Handout 4.1 in Participants Guide. EXPLAIN each feature / function to the participants.

Following is the list of features and functions of vLMIS;

1. Role-Based Access for Users: Users are authenticated based on their geographical levels and the roles that are associated with them.
2. Consumption Reporting A module for Vaccine reporting in the centralized web-accessible data repository of LMIS to report data from data providers. Data Providers can perform monthly data entry. This also includes being able to generate reports for themselves. Service delivery point data will be collected and recorded daily and compiled and reported online monthly using vLMIS.
3. Inventory Management / Automated Stock Transactions Stock transactions are updated in the system and calculated automatically for transfers and adjustments using vLMIS for better management of inventory. The data provided by different geographical levels tracks vaccines in different data entry forms. The National, Provincial, Divisional and District level users will enter vaccines logistics data with batch and expiry information, while Tehsil and UC users will report data without batch.
4. Cold-Chain Assets The details of Cold-chain assets, their location, status and capacity is tracked in vLMIS for maintaining the cold-chain of immunization vaccines. The cold-chain inventory and use is tracked in vLMIS. This module is capable of entering new cold chain assets as well as its current operational status. Each month, along with other logistics data, users will update the operational status of their cold chain assets.
5. Batch Management vLMIS offers batch management in order to maintain the First expiry first out process for vaccine during stock issue.
6. Wastages are important indicators in managing and improving the transparency and accuracy of inventory management. Wastage will be calculated automatically with the help of consumed and unused vial information. The Administrator will manage vLMIS and create all of the necessary data in order to assist users to continue to provide and review logistics data.
7. Data Reports Performance reports enable you to view the monthly reporting performance country-wide. Data Reviewers can access vLMIS using the ‘guest’ user account and get reports about the country’s provinces and districts to help them in logistical decision-making regarding supply chain management in their assigned districts.

8. **Graphs:** Graphs enable you to view and compare different Indicators and view performance and comparison reports over time.

Show Slide # 5**vLMIS Homepage**: The Logistics Management Information System has a single landing page for its three modules for Contraceptives, TB, and Vaccines Management Information System. Enter the URL http://lmis.gov.pk to access the application homepage.

The top bar of the home page displays the main menu, as shown in the image below:

Show Slide # 6 **Users and User Roles**: Ask participants who could be vLMIS users. The participants may say storekeepers. TELL participants that the Vaccine Logistics Management Information System Users are basically store operators that manage and record the inventory and stock transactions. Each geographical level entails different user roles associated with their warehouse/store operations.

Tell participants that we will now briefly discuss the different users and their roles.

Guest User; The Guest user can be any web user with the following capabilities:

- View the logistics data information of warehouse/stores for data analysis.
- View geographical and periodic logistics information in tabular and graphical formats.

Role Based Users; The Role Based Users can log in to vLMIS and perform assigned functions. Each user is assigned responsibilities based on the role and geographical level.

Show Slide # 7 **Users Types** to display the list of users.

Show Slide # 8 to 13 for further details of each user responsibilities.

Show Slide # 14 **Logging into vLMIS**: Tell participants that to log-in into vLMIS.

SESSION 6: COLD CHAIN ASSETS MANAGEMENT

Time: 75 Minutes

SESSION OBJECTIVES

By the end of the session participants should know how to perform following Cold Chain Assets Management functions at Federal, Provincial and District levels:

1. Cold Chain Assets Management and Search
2. Cold Chain Assets Transfer

DOCUMENTS TO BE DISTRIBUTED

- User Guide
- Data Entry Exercises
- Presentations

MATERIALS REQUIRED

- Laptops for each participant (with external mouse, Microsoft Office 2007 or above, Firefox, Wi-Fi)
- Calculators for each participant
- Screens with Multimedia
- Flip Charts with stand
- Markers and Tape

PRESENTATIONS REQUIRED

- Objectives
- Key Cold Chain Asset Management Concepts
- Add Asset
- Transfer Asset
- Asset's Working Status Update

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 6.1: INTRODUCTION AND LOGIN

Time: 15 Minutes

The objective of this activity is to give user an idea about cold chain Management.

Show Slide # 3 Cold Chain Assets Management Overview, tell user who can manage cold chain assets at Federal, Provincial and District levels.

Show Slide # 4 Explain Cold Chain menu items:

Exercise # 6.1: Ask user to login with given National user login from login sheet.

ACTIVITY 6.2: ADD ASSET

Time: 20 Minutes

The objective of this activity is to train user about data entry of adding cold chain asset.

Show Slide # 4 Add Asset, to user and tell them how to reach the data entry screen of add asset.

Show Slide # 5 Add Asset– Screen Introduction to user and tell them about Add Asset screen and its working.

Inform user about each element of screen:

- Asset ID: Tell user about adding unique asset ID provided by EPI program/department.
- Working Status: Tell user about selection of working status of the Asset from the list. Show Slide No. 6 and describe options including: None, Functional, Non-Functional.
- Asset Type: Show Slide No. 7 and explain *asset types*, selecting *asset type* from the list and explain how to add new *asset type*
- Serial No.: Explain asset's serial number.
- Make& Model: Show Slide No. 8 and explain Makes and its linkage with model and also how to add new Makes or Model if not present in the list.
- Estimated Life: Tell user about estimated life of the asset in years.
- Working Since: Tell user to enter date since the asset is being used if it is old.
- Capacity: Explain the capacity of the asset in liters.
- Office: Show Slide No. 9 & 10 "Location Selection" and tell user how to select office to which user want to set location level of the asset and specify the office location in the adjacent drop-down list. Tell them that on selecting the location, the drop-down displays the relevant warehouse/store or facility names in the selected province. Select the required warehouse/store or facility.

Show Slide # 11 **Add Asset – Save** and explain show user can save an asset.

Exercise # 6.2: Ask user to open exercise sheet 6.2 and add a cold chain asset.

ACTIVITY 6.3: SEARCHING COLD CHAIN ASSET

Time: 15 Minutes

The objective of this activity is to train user about searching cold chain assets

Show Slide # 12 **Asset Search – Menu** and explain user how to reach the asset search screen

Show Slide # 13 **Asset Search – Screen / Filters** and explain user how to search for a cold chain asset and how to apply filters to search for a cold chain asset.

These filters are following:-

- **Asset ID:** Tell user about adding unique asset ID provided by EPI program/department.
- **Working Status**: Tell user about selection of working status of the Asset from the list. Show Slide No. 6 and describe options including: None, Functional, Non-Functional.
- **Asset Type**: Show Slide No. 7 and explain asset types, selecting asset type from the list and explain how to add new asset type
- **Serial No**.: Explain asset's serial number.
- **Make & Model**: Show Slide No. 8 and explain Makes and its linkage with model and also how to add new Makes or Model if not present in the list.
- **Estimated Life**: Tell user about estimated life of the asset in years.
- **Working Since**: Tell user to enter date since the asset is being used if it is old.
- **Capacity**: Explain the capacity of the asset in liters.

Show Slide # 14 Asset Search – Results and explain the results of the search.

Show Slide # 15 Asset Search - Working Status History and explain user about working status and history links of the searched asset.

Show Slide # 16 Asset Search – Edit Link and shows user how to edit the searched asset.

Show Slide # 17 Asset Search–Results' Print out and explain how results will be appeared in printout.

Exercise # 6.3: Ask user to search cold chain asset, which they entered in exercise 6.2.

ACTIVITY 6.4: ASSET TRANSFER

Time: 10 Minutes

The objective of this activity is to train user about transferring cold chain asset from one facility/store to another.

Show Slide # 18 **Asset Transfer – Menu** and explain users, how to reach the asset transfer screen.

Show Slide # 19 **Asset Transfer – Screen** and explain users, that by giving Asset ID the asset details appears and how user can transfer a cold chain asset.

Show Slide # 20 & 21 **Location Selection** of Federal/Provincial User and explain users about selection of new location to which user want to transfer asset by selecting level of Facility store or warehouse in the office list, the office list tell user how to select office to which user want to transfer. Specify the office location in the adjacent drop-down list. Tell them that on selecting the location, the drop-down displays the relevant province. If it is district or below district level facility then district list will appear. After selecting district a list of warehouse/store/facility store names appears. Tell them to select the required warehouse/store/facility.

Exercise # 6.4: Ask user to transfer cold chain asset, which they added in exercise 6.4.

ACTIVITY 6.5: ASSET WORKING STATUS UPDATE

Time: 15 Minutes

The objective of this activity is to inform user about reporting working status of cold chain asset every month.

Show Slide # 22 **Asset Status Update – Menu** and explain users, how to reach the asset status update screen.

Show Slide # 23 **Asset Status Update – Screen** and explain users, how current status and history of the asset will appear and how to update and save asset's working status.

Show Slide # 24 **Asset Working Status** and explain to users, the types of working status of an asset.

Exercise # 6.5: Ask user to update the working status of a cold chain asset added in exercise No. 6.2.

SESSION 7: INVENTORY MANAGEMENT (PART 1)

Time: 225 Minutes

SESSION OBJECTIVES

By the end of the session participants should know how to perform following vLMIS functions at Federal EPI Store level:-

1. Stock Receive from Supplier, Searching Receive History and Placement
2. Batch Management, Stacking and Stock Expiry
3. Stock Issue, Searching Issue History and Picking
4. Stock Adjustment and History

MATERIALS REQUIRED

- Laptops for each participant (with external mouse, Microsoft Office 2007 or above, Firefox, Wi-Fi)
- Calculators for each participant
- Front two Screens, one each side with Multimedia
- Markers and Tape
- Flip Charts with stand

DOCUMENTS TO BE DISTRIBUTED

- User Guide
- Data Entry Exercises
- Presentations

PRESENTATIONS REQUIRED

- Objectives
- National User Overview
- Stock Receive
- Stock Placement
- Key Batch Management Concepts
- Stock Issue
- Stock Picking
- Stock Adjustment

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 7.1: NATIONAL USER

Time: 15 Minutes

The objective of this activity is to give user an idea, how supply chain starts from federal level?

Show Slide # 3 **National User Overview**: The diagram in the slide 3 shows how Federal/National user receives stock from suppliers and then distributes the stock to the Provincial, Divisional and District stores. Normally provinces transfers stock to division and districts but few areas like AJK and GB districts receive stock directly from Federal user.

Show Slide # 4 **National User's Homepage**: The objective of this activity is to introduce user about the functions at federal level.

Exercise # 7.1: Ask user to login with given National user login from *login sheet* and view National user Homepage.

ACTIVITY 7.2: STOCK RECEIVE FROM SUPPLIER

Time: 45 Minutes

The objective of this activity is to train user about data entry of receiving stock from supplier.

Show Slide # 5 **Stock Receive from Supplier - Menu**: This Slide shows user how to reach the data entry screen of stock receives from supplier by clicking menu item

Show Slide # 6 **Stock Receive from Supplier – Screen Introduction**: This Slide shows data entry screen of stock receives from supplier

Inform user about each elements of screen as following: -

- **Receipt No:** is an automatically generated number for identifying the receive transaction. It starts from R with 6 number serial number. Every year this number starts from 1.
- **Receipt Reference:** specify the receive reference.
- **Receipt Date:** Click on Receive date to expand the date picker tool.
  - See Slide No. 7 for the usage of date picker
- **Received From:** Select the supplier for the product.
- **Product:** select the product from the list.
- **Unit Price:** specify the unit price in US$.
- **Batch No:** specify the batch number for the product.
  - **Expiry Date:** Click on Expiry date to expand the date picker tool, See Slide No. 7 for the usage of date picker
- **Production Date:** Click on Production date to expand the date picker tool.
  - **VVM Type:** specify the VVM (Vaccine Vial Monitor) Type. Show Slide No. 8 and explain user about VVM and its stages
- **VVM Stage:** specify the VVM stage.
- **Quantity:** specify the received quantity.

Show Slide # 9 to demonstrate how many batches of a product or different products with different batches can be received as one receive.

Show Slide # 10 which displays print out on clicking Save & Print.

Exercise # 7.2: Ask user to open exercise sheet 7.2 and enter receive data with the login used in exercise No 7.1.

ACTIVITY 7.3: SEARCHING RECEIVED STOCK HISTORY & PLACEMENT

Time: 30 Minutes

The objective of this activity is to train user about searching received stock entries either from supplier or another warehouse.

Show Slide # 11 **Stock Receive Search - Menu**: This Slide shows user how to reach the data entry screen of stock receive from supplier

Show Slide # 12 **Stock Receive Search - Screen**: This Slide shows user how to search for a receive stock entry

Show Slide # 13 **Stock Receive Search - Filters**: This Slide shows user how to apply filter to search for receive stock entries. These filters are following:-

- **Search By:**

  The options include:

  - **Receipt No**: if you know the receipt number, select this option and specify the Issue No in the adjacent text box.
  - **Reference No**: To search using the receipt Reference, select this option and then specify the receive Reference in the adjacent text box.
  - **Batch No**: To search using the Batch No., select this option and then specify the Batch No in the adjacent text box.

- **Supplier:** Select the supplier. This is optional field.
- **Product:** Select the required vaccine from the list.
- **Period:** Date From, Date To: Click on date to expand the date picker tool and select **date from** till **date to**.

Show Slide # 14 **Stock Receive Search - Results**: This Slide shows how results will be appeared

Show Slide # 15 **Stock Receive Search –Results' Print out**: This Slide shows how results will be appeared in print out

Exercise # 7.3: Ask user to open search screen and find data entered in exercise 7.2

ACTIVITY 7.4: STOCK PLACEMENT

Time: 15 Minutes

The objective of this activity is to train user about received stock placement assigned.

Show Slide # 16 This Slide shows user to place received stock in three easy steps

- Click the **Add Placement** Link.
- Select Cold Chain Asset and assign quantity.
- Click **Add**.

Show Slide # 17 This Slide shows Print out after placement. Here inform user to use print out for exact placement of products otherwise while picking, products will not be traced

Show Slide # 18 This Slide shows Add Placement link changed into Placed

Exercise # 7.4: Ask user to open placement screen and find data entered in exercise 7.2 and place it as per exercise sheet 7.4

ACTIVITY 7.5: BATCH MANAGEMENT

Time: 20 Minutes

The objective of this activity is to inform user about “First Expiry First Out” and Stacking of Stock.

Show Slide # 19 **Batch Management- Menu**: to show user how to reach Batch Management Screen

Show Slide # 20 Tell basic concepts of Batch Management.

Show Slide # 21 **Batch Management –Screen** to user and explain each search field element

Search By:

- **Vaccine:** select the required vaccine from the list.
- **Status:** specify the status of the batch that you are searching for.
  - **Running:** Only the batches with the status “Running” can be issued.
  - **Stacked:** Stacked batches represent that they are stacked in the warehouse and cannot be issued.
  - **Finished:** batches have finished.
- **Batch No:** Optionally, specify the Batch No of the required batch.
- **Ref. No:** Optionally, specify the Reference No. of the required batch.

Show Slide # 22 **Batch Management – Screen** to user and explain how changing of products appears as a Batch summary, where user can see how many batches are present in **Stacked / Running** and **Finished** state

Show Slide # 23 **Batch Management – Search Result** to user and explain how user can change the status of a batch by clicking button present in Batch Row of Search result list This button is toggle button, it change state of batches from **Stacked** to **Running** and Vice Versa**.** Also mention when stock is finished the batch status automatically turned into **finished** state

Remember that in order to issue batches, tell your user to first set their batch status to **Running**.

Slide # 24 shows **Batch Management Search Result's** Print format

Exercise # 7.5: Ask user to open Batch management screen and search any batch from Exercise sheet 7.2 and change its status

ACTIVITY 7.6: STOCK ISSUE

Time: 40 Minutes

The objective of this activity is to train user about data entry of issuing stock to other warehouses/stores.

Show Slide # 25 **Stock Issue - Menu**: This Slide shows user how to reach the data entry screen of stock issue

Show Slide # 26 **Stock Issue – Screen Introduction**: This Slide shows data entry screen of stock issue

Inform user about each elements of screen as following: -

- **Issue No:** Explain it is an automatically generated number for identifying the Issue transaction. It starts from I with leading 6 number serial number. Every year this number starts from 1.
- **Issue Reference:** Explain issue reference.
- **Issue Date:** Click on Issue date to expand the date picker tool.
- **Office (Issue To)**
    - Show Slide No. 27 for the usage of selecting different office level store, where user wants to send stock.
- **Product:** Select the product from the list.
- **Batch No:** Explain how only running batches appears with the change of products.
    - **Expiry Date:** Explain how only Expiry date appears on the selection of batch.
- **VVM Stage:** Explain VVM and stage.
- **Available**: Explain it is a read only quantity displays the available quantity of the selected batch.
- **Quantity:** specify the Issued quantity.

Show **Slide # 28** to demonstrate a product or different products with different batches can be issued by clicking add entry to an issue invoice. Also show them how to delete an already entered product batch.

Show **Slide # 29** shows print out on clicking Save & Print.

Exercise # 7.6: Ask user to use open exercise sheet 7.6 and issue stock with the login used in exercise No 7.1.

ACTIVITY 7.7: SEARCHING ISSUED STOCK HISTORY

Time: 15 Minutes

The objective of this activity is to train user about searching Issue stock to another warehouse.

Show Slide # 30 **Stock Issue Search - Menu**: to user; how to reach the data entry screen of stock issue to other store/warehouses?

Show Slide # 31**Stock Issue Search - Screen**: to user; how to search for an Issue stock entry?

Show Slide # 32**Stock Issue Search – Filters** to user; how to apply filter to search for receive stock entries? These filters are following:-

- **Search By:**
  The options include:
  - **Issue No:** if you know the issue number, select this option and specify the Issue No in the adjacent text box.
  - **Issue Ref.:** To search using the Issue Ref, select this option and then specify the Issue Ref in the adjacent text box.
  - **Batch No.:** To search using the Batch No., select this option and then specify the Batch No in the adjacent text box.
- **Supplier:** Select the supplier. This is optional field.
- **Product:** Select the required vaccine from the list.
- **Period:** Date From, Date To: Click on date to expand the date picker tool and select date from till date to.

Show Slide # 33**Stock Issue Search - Results**: to describe how results will be appeared

Show Slide # 15 **Stock Issue Search –Results' Print out**: to describe how results will be appeared in print

Exercise # 7.7: Ask user open search screen and find data issued in exercise 7.6

ACTIVITY 7.8: STOCK PICKING

Time: 15 Minutes

The objective of this activity is to train user about picking stock from already placed in Cold chain asset.

Show Slide # 35 **Stock Picking** user how to pick stock in three easy steps

- Click the **Pick Order** Link.
- Select Cold Chain Asset and assign quantity.
- Click **Add**.

Show Slide # 36 **Picked Stock Print** shows user how to *Print* after placement. Here inform user to use print out for exact location for picking of products. Emphasize user that if Placement is not accurate picking will be useless.

Show Slide # 37 **Picker Order becomes Picked** This Slide shows Pick order link changed into Picked

Exercise # 7.8: Ask user to open Pick order screen and find data entered in exercise 7.7 and Pick it as per exercise sheet 7.8

ACTIVITY 7.9: ADD ADJUSTMENTS

Time: 15 Minutes

The objective of this activity is to train user about data entry of issuing stock to other warehouses/stores.

Show Slide # 38 **Add Adjustment - Menu**: This Slide shows user how to reach the data entry screen of stock adjustment

Show Slide # 39 **Add Adjustment – Screen Introduction**: This Slide shows Stock adjustment screen. Explain user about each elements of screen as following: -

- **Adjustment No.:** is an automatically generated unique identifier for the adjustment.
- **Adjustment Date:** Click on date to expand the date picker tool.
- **Ref No.:** Enter the Ref. No. of the adjustment.
- **Product:** Select the required vaccine from the list.
- **Batch:** Specify the batch number for the selected product.
- **Available:** It is read only filled and appears on batch selection and shows the available quantity.
- **Adjustment Type:** Specify the adjustment type. Show user Slide # 40 for different options present in the list:
- **Quantity:** specify the quantity to be adjusted.
- **Comment:** Add comments, if any.

Exercise # 7.9: Ask user to use open exercise sheet 7.9 and add an Adjustment

ACTIVITY 7.10: SEARCHING ADJUSTED STOCK HISTORY

Time: 15 Minutes

The objective of this activity is to train user about searching adjusted stock in his/her warehouse/store.

Show Slide # 41 **Search Adjustment - Menu**: to user; how to reach the data entry screen of search adjustment

Show Slide # 42 **Search Adjustment - Screen**: to user; how to search for an adjustment stock entry and how to apply filter to search for adjusted stock entries? These filters are following:-

Search By: The options include:

- **Adjustment No:** if you know the adjustment number, select this option and specify the adjustment No in the adjacent text box.
- **Adjustment Type:** Specify the adjustment type. Show user Slide # 40 for different options present in the list:
- **Product:** Select the required vaccine from the list.
- **Period:** Date From, Date To: Click on date to expand the date picker tool and select **date from** till **date to**.

Show Slide # 43 **Search Adjustment - Results**: to describe how results will be appeared on the screen

Show Slide # 44 **Search Adjustment - Results' Print out**: to describe how results will be appeared in printout

Exercise # 7.10: Ask user to open search screen and find adjustment made in exercise 7.10

SESSION 8: INVENTORY MANAGEMENT (PART 2)

Time: 135 Minutes

SESSION OBJECTIVES

By the end of the session participants should know how to perform following vLMIS functions at Provincial/Regional EPI level Store:-

1. Stock Receive from Supplier / Warehouse, Searching Receive History and Placement.
2. Batch Management, Stacking and Stock Expiry.
3. Stock Issue, Searching Issue History and Picking.
4. Stock Adjustment and History.

DOCUMENTS TO BE DISTRIBUTED

- User Guide
- Data entry exercises
- Presentations

MATERIALS REQUIRED

- Laptops for each participant (with external mouse, Microsoft Office 2007 or above, Firefox, Wi-Fi)
- Calculators for each participant
- Front two Screens, one each side with Multimedia
- Markers
- Flip Charts with stand

PRESENTATIONS REQUIRED

- Provincial/Regional User Overview
- Stock Receive
- Stock Placement
- Key Batch Management Concepts
- Stock Issue
- Stock Picking
- Stock Adjustment

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 8.1: PROVINCIAL USER

Time: 10 Minutes

The objective of this activity is to give user an idea, how supply chain starts from Provincial/Regional level?

Show Slide # 3 **Provincial/Regional User Overview**: The diagram in the slide 3 shows how Provincial/Regional user receives stock from suppliers as well as Federal EPI Store and then distributes the stock to the Divisional and District stores.

Show Slide # 4 **Provincial/Regional User's Homepage** and explain menu items:

Exercise # 8.1: Ask user to login with given Provincial user login from *login sheet* and view Provincial user Homepage.

ACTIVITY 8.2: STOCK RECEIVE FROM SUPPLIER

Time: 05 Minutes

The objective of this activity is to train user about data entry of receiving stock from supplier.

Show Slide # 5 Stock Receive from Supplier - Menu: to user; how to reach the data entry screen of stock receive from supplier by clicking the menu

Show Slide # 6 Stock Receive from Supplier – Screen Introduction: to user and Introduce how data entry screen of stock receive from supplier works

Inform user about each elements of screen as following: -

- Receipt No: is an automatically generated number for identifying the receive transaction. It starts from R with 6 number serial number. Every year this number starts from 1.
- Receipt Reference: specify the receive reference.
- Receipt Date: Click on Receive date to expand the date picker tool.
  Show Slide No. 7 for the usage of date picker
- Received From: Select the supplier for the product.
- Product: select the product from the list.
- Unit Price: specify the unit price in US$.
- Batch No: specify the batch number for the product.
  Expiry Date: Click on Expiry date to expand the date picker tool, See Slide Show No. 7 for the usage of date picker
- Production Date: Click on Production date to expand the date picker tool.
  Show Slide No. 8 and explain users about VVM and its stages.
- VVM Type: specify the VVM (Vaccine Vial Monitor) Type.
- VVM Stage: specify the VVM stage.
- Quantity: specify the received quantity.

Show Slide # 9 to demonstrate how many batches of a product or different products with different batches can be received as one receive.

Show Slide # 10 shows how to take print out by clicking on Save & Print button.

Exercise # 8.2: Ask user to open exercise sheet 8.2 and enter receive data with the login used in exercise No 8.1.

ACTIVITY 8.3: ITEM ADJUSTMENT

Time: 45 Minutes

The objective of this activity is to train user about data entry of receiving stock from Federal EPI store or from Lower level i.e. Divisional and District Store.

Show Slide # 11**Stock Receive from Warehouse - Menu**: to user; how to reach the data entry screen of “stock receive from warehouse” by clicking menu item

Show Slide # 12 **Stock Receive from Warehouse – Screen Introduction**: to user and Introduce data entry screen of stock receive from warehouse works

Inform user about each elements of screen as following: -

- **Product:** select the product from the list.
- **Batch No:** specify the batch number for the product.
- **Quantity:** specify the received quantity.
- **VVM Stage:** specify the VVM stage.
- **Adjusted Qty:** tell user if he enters number of damaged products the adjustment list will enabled.
- **Adjustment:** Tell user to select reason of damaged stock from this list
- **Selection Check Box**
- **Remarks:** User given remarks
- **Receipt Reference:** specify the receive reference.
- **Receipt Date:** Click on Receive date to expand the date picker tool.

Show Slide # 13 to demonstrate how stock receives if it is not damaged

Show Slide # 14 shows how stock receives if it is not damaged.

Exercise # 8.3: Ask user to use open exercise sheet 8.3 and enter given stock receipt number

ACTIVITY 8.4: SEARCHING RECEIVED STOCK HISTORY

Time: 10 Minutes

The objective of this activity is to train user about searching received stock entries either from supplier or another warehouse.

Show Slide # 15 **Stock Receive Search - Menu**: This Slide shows user how to reach the data entry screen of stock receives from supplier/warehouse

Show Slide # 16 **Stock Receive Search - Screen**: This Slide shows user how to search for a received stock entry

Show Slide # 17 **Stock Receive Search - Filters**: This Slide shows user how to apply filter to search for receive stock entries. These filters are following:-

- **Search By:**
  The options include:
  - **Receive No**: if you know the receipt number, select this option and specify the Receipt No in the adjacent text box.
  - **Reference No**: To search using the Receive Ref, select this option and then specify the receive Ref in the adjacent text box.
  - **Batch No.**: To search using the Batch No., select this option and then specify the Batch No in the adjacent text box.
- **Supplier:** Select the supplier. This is optional field.
- **Product:** Select the required vaccine from the list.
- **Period:** Date From, Date To: Click on date to expand the date picker tool and select **date from** till **date to**.

Show Slide # 18 **Stock Receive Search - Results**: This Slide shows how results will be appeared

Show Slide # 19 **Stock Receive Search –Results' Print out**: This Slide shows how results will be appeared in printout.

Exercise # 8.4: Ask user to open search screen and find data entered in exercise 8.2

ACTIVITY 8.5: STOCK PLACEMENT

Time: 10 Minutes

The objective of this activity is to train user about received stock placement assigned.

Show Slide # 20 This Slide shows user to place received stock in three easy steps

- Click the **Add Placement** Link.
- Select Cold Chain Asset and assign quantity.
- Click **Add**.

Show Slide # 21 This Slide shows Print out after placement. Here inform user to use print out for exact placement of products otherwise while picking products will not be traced

Show Slide # 22 This Slide shows Add Placement link changed into Placed

Exercise # 8.5: Ask user to open placement screen and find data entered in exercise 8.2 and place it as per exercise sheet 8.4

ACTIVITY 8.6: BATCH MANAGEMENT

Time: 10 Minutes

The objective of this activity is to inform user about “First Expiry First Out”, Stacking of Stock.

Show Slide # 23 **Batch Management- Menu**: to shows user how to reach Batch Management Screen

Show Slide # 24Tell basic concepts of Batch Management.

Show Slide # 25 **Batch Management –Screen** to user and explain each search field element.

Search By:

- **Vaccine:** select the required vaccine from the list.
- **Status:** specify the status of the batch that you are searching for.
    - **Running:** Only the batches with the status “Running” can be issued.
    - **Stacked:** Stacked batches represent that they are stacked in the warehouse and cannot be issued.
    - **Finished:** batches have finished.
- **Batch No.:** Optionally, specify the Batch No of the required batch.
- **Ref. No:** Optionally, specify the Ref. No. of the required batch.

Exercise # 8.6: Ask user to open Batch management screen and search any batch from Exercise sheet 8.2 and change its status

Show Slide # 26 **Batch Management – Screen** to user and explain how changing of products appears as a Batch summary, where user can see how many batches are present in **Stacked / Running** and **Finished** state.

Show Slide # 27 **Batch Management – Search Result** to user and explain how user can change the status of a batch by clicking button present in Batch Row of Search result list This button is toggle button, it change state of batches from **Stacked** to **Running** and Vice Versa**.** Also mention when stock is finished the batch status automatically turned into **Finished** state.

Remember that in order to issue batches, tell your user to first set their batch status to **Running**.

Shows Slide # 28 to user about **Batch Management Search Result's Print** format.

ACTIVITY 8.7: STOCK ISSUE

Time: 25 Minutes

The objective of this activity is to train user about data entry of issuing stock to other warehouses/stores.

Show Slide # 29 **Stock Issue - Menu**: This Slide shows user how to reach the data entry screen of stock issued.

Show Slide # 30 **Stock Issue – Screen Introduction**: This Slide shows data entry screen of stock issued to other warehouses.

Inform user about each elements of screen as following:

- **Issue No:** Explain it is an automatically generated number for identifying the Issue transaction. It starts from I with leading 6 number serial number based on fiscal year. Every year this number starts from 1.
- **Issue Reference:** Explain issue reference.
- **Issue Date:** Click on Issue date to expand the date picker tool.
- **Office (Issue To)**
- Show Slide No. 31 for the usage of selecting different office level store, where user wants to send stock.
- **Product:** Select the product from the list.
- **Batch No:** Explain how only running batches appears with the change of products.
- **Expiry Date:** Explain how only Expiry date appears on the selection of batch.
- **VVM Stage:** Explain VVM and stage.
- **Available**: Explain it is a read only quantity displays the available quantity of the selected batch.
- **Quantity:** specify the issued quantity.

Show Slide # 32 to demonstrate a product or different products with different batches can be issued by clicking add entry to an issue invoice. Also show them how to delete an already entered product batch.

Show Slide # 33 shows print out on clicking Save & Print.

Exercise # 8.7: Ask user to use open exercise sheet 8.7 and issue stock with the login used in exercise No 8.1.

ACTIVITY 8.8: SEARCHING ISSUED STOCK HISTORY

Time: 05 Minutes

The objective of this activity is to train user about searching Issue stock to another warehouse.

Show Slide # 34 **Stock Issue Search - Menu**: to user; how to reach the data entry screen of stock issue to other store/warehouses?

Show Slide # 35 **Stock Issue Search - Screen**: to user; how to search for an Issue stock entry?

Show Slide # 36 **Stock Issue Search – Filters** to user; how to apply filter to search for issue stock entries? These filters are following:-

- **Search By:**
  The options include:
  - **Issue No:** if you know the issue number, select this option and specify the Issue No in the adjacent text box.
  - **Issue Ref.:** To search using the Issue Ref, select this option and then specify the Issue Ref in the adjacent text box.
  - **Batch No.:** To search using the Batch No., select this option and then specify the Batch No in the adjacent text box.
- **Supplier:** Select the supplier. This is optional field.
- **Product:** Select the required vaccine from the list.

- **Period:** Date From, Date To: Click on date to expand the date picker tool and select **date from** till **date to**.

Show Slide # 37**Stock Issue Search - Results**: to describe how results will be appeared

Show Slide # 38**Stock Issue Search –Results' Print out**: to describe how results will be appeared in print

Exercise # 8.8: Ask user open search screen and find data issued in exercise 8.6

ACTIVITY 8.9: STOCK PICKING

Time: 05 Minutes

The objective of this activity is to train user about picking stock from already placed in Cold chain asset.

Show Slide # 39 to user how to pick stock in three easy steps

- Click the **Pick Order** Link.
- Select Cold Chain Asset and assign quantity.
- Click **Add**.

Show Slide # 40 shows user how to *Print* after placement. Here inform user to use print out for exact location for picking of products. Emphasize user that if Placement is not accurate picking will be useless.

Show Slide # 41 This Slide shows Pick order link changed into Picked.

Exercise # 8.9: Ask user to open Pick order screen and find data entered in exercise 8.7 and Pick it as per exercise sheet 8 .8

ACTIVITY 8.10: ADD ADJUSTMENTS

Time: 05 Minutes

The objective of this activity is to train user about data entry of issuing stock to other warehouses/stores.

Show Slide # 42 **Add Adjustment - Menu**: This Slide shows user how to reach the data entry screen of stock adjustment

Show Slide # 43 **Add Adjustment – Screen Introduction**: This Slide shows Stock adjustment screen. Explain user about each elements of screen as following: -

- **Adjustment No.:** is an automatically generated unique identifier for the adjustment.
- **Adjustment Date:** Click on date to expand the date picker tool.
- **Ref No.:** Enter the Ref. No. of the adjustment.
- **Product:** Select the required vaccine from the list.
- **Batch:** Specify the batch number for the selected product.
- **Available:** It is read only filled and appears on batch selection and shows the available quantity.
- **Adjustment Type:** Specify the adjustment type. Show user Slide # 44 for different options present in the list:
- **Quantity:** specify the quantity to be adjusted.
- **Comment:** Add comments, if any.

Exercise # 8.10: Ask user to use open exercise sheet 8.10 and add an Adjustment

ACTIVITY 8.11: SEARCHING ADJUSTED STOCK HISTORY

Time: 05 Minutes

The objective of this activity is to train user about searching adjusted stock in his/her warehouse/store.

Show Slide # 45 **Search Adjustment - Menu**: to user; how to reach the data entry screen of search adjustment

Show Slide # 46 **Search Adjustment - Screen**: to user; how to search for an adjustment stock entry and how to apply filter to search for adjusted stock entries? These filters are following:-

Search By: The options include:

- **Adjustment No:** if you know the adjustment number, select this option and specify the adjustment No in the adjacent text box.
- **Adjustment Type:** Specify the adjustment type. Show user Slide # 44 for different options present in the list:
- **Product:** Select the required vaccine from the list.
- **Period:** Date From, Date To: Click on date to expand the date picker tool and select **date from** till **date to**.

Show Slide # 47 **Search Adjustment - Results**: to describe how results will be appeared on the screen

Show Slide # 48 **Search Adjustment - Results' Print out**: to describe how results will be appeared in printout

Exercise # 8.11: Ask user to open search screen and find adjustment made in exercise 8.10

SESSION 9: INVENTORY MANAGEMENT (PART 3)

Time: 105 Minutes

SESSION OBJECTIVES

By the end of the session participants should know how to perform following vLMIS functions at Divisional, District & Tehsil EPI level Store:

1. Stock Receive from Warehouse, Searching Receive History and Placement
2. Batch Management, Stacking and Stock Expiry
3. Stock Issue, Searching Issue History and Picking
4. Stock Adjustment and History

DOCUMENTS TO BE DISTRIBUTED

- User Guide
- Exercises
- Presentations

MATERIALS REQUIRED

- Laptops for each participant (with external mouse, Microsoft Office 2007 or above, Firefox, Wi-Fi)
- Calculators for each participant
- Front two Screens, one each side with Multimedia
- Markers
- Flip Charts with stand

PRESENTATIONS REQUIRED

- Divisional/District and Tehsil/Taluka User Overview
- Stock Receive
- Stock Placement
- Key Batch Management Concepts
- Stock Issue
- Stock Picking
- Stock Adjustment

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 9.1: DIVISIONAL/DISTRICT/TEHSIL USER

Time: 10 Minutes

The objective of this activity is to give user an idea, how supply chain starts from Divisional / District level?

Show Slide # 3 Divisional / Districts / Tehsil User Overview: The diagram in the slide 3 shows how Divisional / District user receives stock from other warehouses as well as Federal EPI Store and then distributes the stock to the Divisional and District stores.

Show Slide # 4 Divisional / District / Tehsil User's Homepage and explain menu items:

Exercise # 9.1: Ask user to login with given Divisional / District / Tehsil user login from *login sheet* and view Divisional / District / Tehsil user Homepage

ACTIVITY 9.2: STOCK RECEIVE FROM WAREHOUSE/STORE

Time: 10 Minutes

The objective of this activity is to train user about data entry of receiving stock from Federal EPI store or from Lower level i.e. Divisional and District Store.

Show Slide # 5 Stock Receive from Warehouse - Menu: to user; how to reach the data entry screen of "stock receive from warehouse" by clicking menu item

Show Slide # 6 Stock Receive from Warehouse – Screen Introduction: to user and Introduce data entry screen of stock receive from warehouse works

Inform user about each elements of screen as following:

- **Product:** select the product from the list.
- **Batch No:** specify the batch number for the product.
- **Quantity:** specify the received quantity.
- **VVM Stage:** specify the VVM stage.
- **Adjusted Quantity:** tell user if he enters number of damaged products the adjustment list will enabled.
- **Adjustment:** Tell user to select reason of damaged stock from this list
- **Selection Check Box**
- **Remarks:** User given remarks
- **Receipt Reference:** specify the receive reference.
- **Receipt Date:** Click on Receive date to expand the date picker tool.

Show Slide # 7 to demonstrate how stock receives if it is not damaged

Show Slide # 8 shows how stock receives if it is not damaged.

Exercise # 9.2: Ask user to open exercise sheet 9.2 and enter the given stock receipt number.

ACTIVITY 9.3: SEARCHING RECEIVED STOCK HISTORY

Time: 10 Minutes

The objective of this activity is to train user about searching received stock entries either from supplier or another warehouse.

Show Slide # 9 **Stock Receive Search - Menu**: This Slide shows user how to reach the data entry screen of stock receive

Show Slide # 10 **Stock Receive Search - Screen**: This Slide shows user how to search for a received stock entry

Show Slide # 11 **Stock Receive Search - Filters**: This Slide shows user how to apply filter to search for receive stock entries. These filters are following:-

- **Search By:**
  The options include:
  - **Receive No**: if you know the issue number, select this option and specify the Issue No in the adjacent text box.
  - **Reference No**.: To search using the Issue Ref, select this option and then specify the Issue Ref in the adjacent text box.
  - **Batch No**.: To search using the Batch No., select this option and then specify the Batch No in the adjacent text box.
- **Supplier:** Select the supplier/warehouse. This is optional field.
- **Product:** Select the required vaccine from the list.
- **Period:** Date From, Date To: Click on date to expand the date picker tool and select **date from** till **date to**.

Show Slide # 12 **Stock Receive Search - Results**: This Slide shows how results will appear.

Show Slide # 13 **Stock Receive Search –Results' Print out**: This Slide shows how results will be appeared in printout.

Exercise # 9.3: Ask user to open search screen and find data entered in exercise 9.2

ACTIVITY 9.4: STOCK PLACEMENT

Time: 10 Minutes

The objective of this activity is to train user about received stock placement assigned.

Show Slide # 14 This Slide shows user to place received stock in three easy steps

- Click the **Add Placement** Link.
- Select Cold Chain Asset and assign quantity.
- Click **Add**.

Show Slide # 15 This Slide shows Print out after placement. Here inform user to use print out for exact placement of products otherwise while picking products will not be traced

Show Slide # 16 This Slide shows Add Placement link changed into Placed.

Exercise # 9.4: Ask user to open placement screen and find data entered in exercise 9.2 and place it as per exercise sheet 9.4

ACTIVITY 9.5: BATCH MANAGEMENT

Time: 10 Minutes

The objective of this activity is to inform user about “First Expiry First Out”, Stacking of Stock.

Show Slide # 17 **Batch Management- Menu**: to shows user how to reach Batch Management Screen.

Show Slide # 18 Tell basic concepts of Batch Management.

Show Slide # 19 **Batch Management –Screen** to user and explain each search field element.

Search By:

- **Vaccine:** select the required vaccine from the list.
- **Status:** specify the status of the batch that you are searching for.
  - **Running:** Only the batches with the status “Running” can be issued.
  - **Stacked:** Stacked batches represent that they are stacked in the warehouse and cannot be issued.
  - **Finished:** batches have finished.
- **Batch No.:** Optionally, specify the Batch No of the required batch.
- **Ref. No.:** Optionally, specify the Ref. No. of the required batch.

Show Slide # 20 **Batch Management – Screen** to user and explain how changing of products appears as a Batch summary, where user can see how many batches are present in **Stacked / Running** and **Finished** state.

Show Slide # 21 **Batch Management – Search Result** to user and explain how user can change the status of a batch by clicking button present in Batch Row of Search result list This button is toggle button, it change state of batches from **Stacked** to **Running** and Vice Versa**.** Also mention when stock is finished the batch status automatically turned into **Finished** state.

Remember that in order to issue batches, tell your user to first set their batch status to **Running**.

Shows Slide # 22 to user about **Batch Management Search Result's Print** format.

Exercise # 9.5: Ask user to open Batch management screen and search any batch from Exercise sheet 9.2 and change its status

ACTIVITY 9.6: STOCK ISSUE

Time: 35 Minutes

The objective of this activity is to train user about data entry of issuing stock to other warehouses/stores.

Show Slide # 23 **Stock Issue - Menu**: This Slide shows user how to reach the data entry screen of stock issue

Show Slide # 24 **Stock Issue – Screen Introduction**: This Slide shows data entry screen of stock issue

Inform user about each elements of screen as following: -

- **Issue No:** Explain it is an automatically generated number for identifying the Issue transaction. It starts from I with leading 6 number serial number based on fiscal year. Every year this number starts from 1.
- **Issue Reference:** Explain issue reference.
- **Issue Date:** Click on issue date to expand the date picker tool.
- **Office (Issue To)**
    - Show Slide No. 25/26/27 for the usage of selecting different office level store, where user want to send stock.
- **Product:** Select the product from the list.
- **Batch No:** Explain how only running batches appears with the change of products.
    - **Expiry Date:** Explain how only Expiry date appears on the selection of batch.
- **VVM Stage:** Explain VVM and stage.
- **Available**: Explain it is a read only quantity displays the available quantity of the selected batch.
- **Quantity:** specify the received quantity.

Show Slide # 28 to demonstrate a product or different products with different batches can be issued by clicking add entry to an issue invoice. Also show them how to delete an already entered product batch.

Show Slide # 29 shows print out on clicking Save & Print.

Exercise # 9.6: Ask user to open exercise sheet 9.6 and issue stock with the login used in exercise No 9.1

ACTIVITY 9.7: SEARCHING ISSUED STOCK HISTORY

Time: 05 Minutes

The objective of this activity is to train user about searching Issue stock to another warehouse.

Show Slide # 30 **Stock Issue Search - Menu**: to user; how to reach the data entry screen of stock issue to other store/warehouses?

Show Slide # 31 **Stock Issue Search - Screen**: to user; how to search for an Issue stock entry?

Show Slide # 32 **Stock Issue Search – Filters** to user; how to apply filter to search for issue stock entries? These filters are following:-

- **Search By:**
  The options include:
  - **Issue No:** if you know the issue number, select this option and specify the Issue No in the adjacent text box.
  - **Issue Ref.:** To search using the Issue Ref, select this option and then specify the Issue Ref in the adjacent text box.
  - **Batch No.:** To search using the Batch No., select this option and then specify the Batch No in the adjacent text box.
- **Supplier:** Select the supplier/warehouse. This is optional field.
- **Product:** Select the required vaccine from the list.
- **Period:** Date From, Date To: Click on date to expand the date picker tool and select **date from** till **date to**.

Show Slide # 33 **Stock Issue Search - Results**: to describe how results will be appeared

Show Slide # 34 **Stock Issue Search –Results' Print out**: to describe how results will be appeared in print

Exercise # 9.7: Ask user open search screen and find data issued in exercise 9.6

ACTIVITY 9.8: STOCK PICKING

Time: 05 Minutes

The objective of this activity is to train user about picking stock from already placed in Cold chain asset.

Show Slide # 35 **Stock Picking** to user, how to pick stock in three easy steps

- Click the **Pick Order** Link.
- Select Cold Chain Asset and assign quantity.
- Click **Add**.

Show Slide # 36 shows user how to *Print* after placement. Here inform user to use print out for exact location for picking of products. Emphasize user that if Placement is not accurate picking will be useless.

Show Slide # 37 This Slide shows <u>Pick order</u> link changed into <u>Picked</u>.

Exercise # 9.8: Ask user to open Pick order screen and find data entered in exercise 9.7 and Pick it as per exercise sheet 9.8

ACTIVITY 9.9: ADD ADJUSTMENTS

Time: 05 Minutes

The objective of this activity is to train user about data entry of stock adjustment.

Show Slide # 38 **Add Adjustment - Menu**: This Slide shows user how to reach the data entry screen of stock adjustment.

Show Slide # 39 **Add Adjustment – Screen Introduction**: This Slide shows Stock adjustment screen. Explain user about each elements of screen as following: -

- **Adjustment No.:** is an automatically generated unique identifier for the adjustment.
- **Adjustment Date:** Click on date to expand the date picker tool.
- **Ref No.:** Enter the Ref. No. of the adjustment.
- **Product:** Select the required vaccine from the list.
- **Batch:** Specify the batch number for the selected product.
- **Available:** It is read only, filled and appears on batch selection and shows the available quantity.
- **Adjustment Type:** Specify the adjustment type. Show user Slide # 40 for different options present in the list:
- **Quantity:** specify the quantity to be adjusted.
- **Comment:** Add comments, if any.

Exercise # 9.9: Ask user to open exercise sheet 9.9 and add an Adjustment

ACTIVITY 9.10: SEARCHING ADJUSTED STOCK HISTORY

Time: 05 Minutes

The objective of this activity is to train user about searching adjusted stock in his/her warehouse/store.

Show Slide # 41 **Stock Adjustment Search - Menu**: to user; how to reach the data entry screen of stock Adjusted?

Show Slide # 42 **Stock Adjustment Search - Screen**: to user; how to search for an adjusted stock entry and how to apply filter to search for adjusted stock entries? These filters are following:-

Search By: The options include:

- **Adjustment No:** if you know the adjustment number, select this option and specify the adjustment No in the adjacent text box.
- **Adjustment Type:** Specify the adjustment type. Show user Slide # 46 for different options present in the list:
- **Product:** Select the required vaccine from the list.
- **Period:** Date From, Date To: Click on date to expand the date picker tool and select **date from** till **date to**.

Show Slide # 43 **Search Adjustment - Results**: to describe how results will be appeared on the screen

Show Slide # 44 **Search Adjustment - Results' Print out**: to describe how results will be appeared in printout

Exercise # 9.10: Ask user to open search screen and find data adjusted in exercise 9.9

SESSION 10: CONSUMPTION REPORTING

Time: 120 Minutes

SESSION OBJECTIVES

By the end of the session participants should know how:

- To report monthly consumption of vaccines and other logistics
- To report Monthly Cold Chain Asset's working status at Union Council level

DOCUMENTS TO BE DISTRIBUTED

- User Guide
- Data entry exercise
- Presentation – Participant Guide

MATERIALS NEEDED

- Laptops for each participant (with external mouse, Microsoft Office 2007 or above, Firefox, WiFi)
- Screens with Multimedia
- Flip Charts with stand
- Markers and Tape

PRESENTATIONS REQUIRED

- Key Consumption Reporting Concepts
- Monthly Consumption
- Cold Chain Working Status Update

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 10.1: CONSUMPTION REPORTING CONCEPTS

Time: 30 Minutes

The objective of this activity is to give in-depth knowledge of Consumption reporting concepts.

Show Slide # 3 & 4 Consumption Reporting Concepts, tell users about different logistics concept related to Immunization i.e.

- Opening balance
- Receive
- Dispensed
- Vial Used for dispensing
- Unusable Vials
- Closing Balance

Show Slide # 5 Consumption Reporting Form and explain that manual data will be received in the form present in the slide:

Exercise # 10.1: Ask user to open Exercise No 10.1 and develop data.

ACTIVITY 10.2: LOGIN

Time: 15 Minutes

The objective of this activity is to train user login and how user can access EPI centers/facilities linked with user login

Show Slide # 6 **login** to user and tell them accessing home page

Exercise # 10.2: Ask user to open Exercise No 10.2 and login with given user.

ACTIVITY 10.3: ADD CONSUMPTION REPORT

Time: 60 Minutes

The objective of this activity is to train user about data entry of consumption form.

Show Slide # 7**Consumption Reporting – Menu** to user and tell them how to reach the Consumption reporting data entry screen.

Show Slide # 8 **Monthly Consumption– Screen Introduction** to user and introduces them about Selection of Union Council and View Previous Monthly Reports.

Show Slide # 9**Selection of Union Councils and EPI Centers** and explain how user can select union council and EPI center.

Show Slide # 10 **Consumption Report – Form** and explain how users can Enter Data in the Form as per concepts.

Show Slide # 11**Monthly Consumption – Previous Reports** and explain how user can view and update previous reports.

Exercise # 10.3: Ask user to open exercise sheet 10.3 and add Consumption Report.

ACTIVITY 10.4: MONTHLY COLD CHAIN WORKING STATUS UPDATE

Time: 15 Minutes

The objective of this activity is to train user about Monthly Cold Chain Working Status Update

Show Slide # 12 **Cold Chain Update – Menu** and explain user how to reach Cold Chain Working Status Update screen

Show Slide # 13 **Selection of Union Councils and EPI Centers** and explain how user can select union council and EPI center.

Show Slide # 14 **Cold Chain Working Status Update –Steps** and explain user how to update working status

Exercise # 10.4: Ask user to Update Assets present in their list.

SESSION 11: REPORTS

Time: 105 Minutes

SESSION OBJECTIVES

By the end of the session participants should know how to generate the following Data Reports:

1. Summary Reports
2. Yearly Reports
3. Data Performance
4. Others

DOCUMENTS TO BE DISTRIBUTED

- User Guide
- Report Generation exercises
- Presentation – Participant Guide

MATERIALS REQUIRED

- Laptops for each participant (with external mouse, Microsoft Office 2007 or above, Firefox, Wi-Fi)
- Screens with Multimedia

PRESENTATIONS REQUIRED

- Reports Overview
- Summary Reports
- Yearly Reports
- Data Performance Reports
- Other Reports

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 11.1: SUMMARY REPORT

Time: 30 MINUTES

The objective of this activity is to give users an idea about Reports.

Show Slide # 3 **Reports Overview**, tells users who can generate Reports at National, Provincial, Divisional, District, Tehsil, Union Council levels.

Show Slide # 4 **Explain Summary Reports menu items**.

Introduction to users and introduces them about Reports and its working.

Show Slide # 5 **Summary Report Concepts**.

Tell users about concept of summary report. The objective of this activity is to train users about generating data reports.

Show Slide # 6.**Report Parts**

Tell users about report parts. Explain its purpose and screen elements.

- **Header bar:**
  Explain to Users that the Header bar displays the **Reporting Rate** of vaccines on the left side and the **Availability Rate** of vaccines on the right side of District and UC. Tell users that **Reporting Rate enables them to** view the warehouse stores which have not reported for a particular month and **Availability Rate** displays the months of stock for each District and UC stores. Tell users about click the icon to open the Reporting Rate and Stock Availability rate reports directly.
- **MOS Legends:**
  Tell users about Months of Stock concept and what MOS legends signify. Explain to them using the values in the Report table.

- **Filters:**

  Tell users about filters and explain the **Month** and **Year** filters. Explain the users how to filter values based on **Month** and **Year**.

- **Month**:

  Displays the list of Month.

- **Year:**

  Displays the list of Year

Tell users to click **GO** to generate report.

Show Slide # 7 **Report Result**

Tell users system displays the required report with following fields.

- **Products**: Explain to users that field displays the list of vaccines.

- **Consumption:** Explain to users that field displays the consumption data of vaccines for the last reported month. The data for each vaccine is the sum of all reporting levels.

- **Average Monthly Consumption:** Explain to users that field is calculated as average of aggregated consumption of the last three non-zero consumption months.

- **On Hand:** Explain to users that field the stock of product on hand in order to monitor stock positions and anticipate stock outs in advance.

- **MOS:** Explain to users that field Month of Stocks is the estimate of number of months the stock will last. This calculation is based on average monthly consumption.

Show Slide # 8 **National Report-Screen**

Tell users about National report. Explain its purpose and screen elements.

Show Slide # 9 **Provincial Report: Filters**

Tell users about filters and explain the Month, Year and product filters. Explain the users how to filter values based on Month, Year and product.

- **Month**: displays the list of Month.
- **Year:** displays the list of Year
- **Product:** displays the list of vaccines.

Tell users to click **GO** to generate report.

Show Slide # 10 **Provincial Report-Screen**

Tell users about Provincial report. Explain its purpose and screen elements.

Show Slide # 11 **Divisional Report: Filters**

Tell users about filters and explain the **Month, Year, Province/Region,** and **product** filters. Explain the users how to filter values based on **Month, Year, Province/Region,** and **product.**

- **Month**: displays the list of Month.
- **Year:** displays the list of Year
- **Province/Region:** displays the list of Province/Region.
- **Products**: displays the list of vaccines.

Tell users to click **GO** to generate report.

Show Slide # 12 **Divisional Report-Screen**

Tell users about Divisional report. Explain its purpose and screen elements.

Show Slide # 13 **District Report: Filters** and Tell users about filters and explain the **Month, Year, Province/Region** and **Product** filters. Explain the users how to filter values based **on Month, Year, Province/Region** and **Product.**

- **Month**: displays the list of Month.
- **Year:** displays the list of Year
- **Province/Region:** displays the list of Province/Region.
- **Products**: displays the list of vaccines.

Tell users to click **GO** to generate report.

Show Slide # 14 **District Report-Screen**

Tell users about District report. Explain its purpose and screen elements.

Show Slide # 15 **Tehsil Report: Filters**

Tell users about filters and explain the **Month, Year, Province/Region, District** and **Product** filters. Explain the users how to filter values based on **Month, Year, Province/Region, District** and **Product**.

- **Month**: displays the list of Month.
- **Year:** displays the list of Year
- **Province/Region:** displays the list of Province/Region.
- **District:** displays the list of District.
- **Products**: displays the list of vaccines.

Tell users to click **GO** to generate report.

Show Slide # 16 **Tehsil Report-Screen**

Tell users about Tehsil report. Explain its purpose and screen elements.

Show Slide #17**Union Council Report: Filters**

Tell users about filters and explain the **Month, Year, province/Region, District, Tehsil, UC**and **Product** filters. Explain the users how to filter values based on **Month, Year, Province/Region, District, Tehsil, UC** and **Product**.

- **Month**: displays the list of Month.
- **Year:** displays the list of Year
- **Province/Region:** displays the list of Province/Region.
- **District:** displays the list of District.
- **Tehsil:** displays the list of Tehsil.
- **UC:** displays the list of Union Council.
- **Products**: displays the list of vaccines.

Tell users to click **GO** to generate report.

Show Slide # 18 **Union Council Report-Screen** and Tell users about Union Council report. Explain its purpose and screen elements.

Show Slide # 19 **Stock Availability Report**: Filters

Tell users about filters and explain the **Month, Year, Province/Region** and **Product** filters. Explain the users how to filter values based on **Month, Year, Province/Region** and **Product**.

- **Month**: displays the list of Month.
- **Year:** displays the list of Year
- **Province/Region:** displays the list of Province/Region.
- **Products**: displays the list of vaccines.

Tell users to click **GO** to generate report.

Show Slide # 20 **Stock Availability Report-Screen** explain to users and introduces them about Reports and its working.

Exercise # 11.1: Ask users to use current month and year to generate a District report.

ACTIVITY 11.2: YEARLY REPORT

Time: 20 Minutes

Show Slide # 21 **Explain Yearly Reports** menu items.

Orientation to users and introduces them about Reports and its working. The objective of this activity is to train users about generating data reports.

Show Slide # 22 **Provincial Yearly Report**- Filters

Tell users about filters and explain the **Year, Province/Region** and **Indicator** filters. Explain the users how to filter values based on **Year, Province/Region** and **Indicator.**

- **Year:** displays the list of Year
- **Province/Region:** displays the list of Province/Region.
- **Product:** displays the list of Product.
- **Indicator**: displays the list of Indicator.

Tell users to click **GO** to generate report.

Show Slide # 23 **Provincial Yearly Report-Screen**

Tell users about Provincial Yearly Report. Explain its purpose and screen elements.

Show Slide # 24 **District Yearly Report- Filters**

Tell users about filters and explain the **Year, Province/Region, Product** and **Indicator** filters. Explain the users how to filter values based on **Year, Province/Region, Product** and **Indicator**.

- **Year:** displays the list of Year
- **Province/Region:** displays the list of Province/Region.
- **Product:** displays the list of Product.
- **Indicator**: displays the list of Indicator.

Tell users to click **GO** to generate report.

Show Slide # 25 **District Yearly Report-Screen** Orientation to users and introduces them about Report and its working.

Exercise # 11.2: Ask users to use current month and year to generate a Provincial yearly report.

ACTIVITY 11.3: DATA PERFORMANCE-MENU

Time: 15 MINUTES

Show Slide # 26 Data Performance menu items.

Orientation to users and introduces them about Reports and its working. The objective of this activity is to train users about generating data reports.

Show Slide # 27 Non Reported Districts Report: Filters.

Tell users about filters and explain the Month, Year, Province/Region and Type filters. Explain the users how to filter values based on Month, Year, Province/Region and Type.

- Month: displays the list of Month
- Year: displays the list of Year
- Province/Region: displays the list of Province/Region.
- Type: displays the list of Type.

Tell users to click GO to generate report.

Show Slide # 28 Non Reported Districts Report-Screen Introduction to users and introduces them about Report and it's working.

Exercise # 11.3: Ask users to use current month and year to generate a Non Reported Districts report.

ACTIVITY 11.4: CENTRAL/PROVINCIAL WAREHOUSE REPORT

Time: 15 MINUTES

Show Slide # 29 Other Reports-Menu items.

Orientation to users and introduces them about Reports and its working. The objective of this activity is to train users about generating data reports.

Show Slide # 30Central/Provincial Warehouse Report: Filters

Tell users about filters and explain the Year, Indicator and Warehouse filters. Explain the users how to filter values based on Year, Indicator and Warehouse.

- Year: displays the list of Year
- Indicator: displays the list of indicator.
- Warehouse: displays the list of Warehouse.

Tell users to click GO to generate report.

Show Slide # 31 Central/Provincial Report-Screen Orientation to users and introduces them about Report and its working.

Exercise # 11.4: Ask users to use current month and year to generate a Central/Provincial Warehouse report.

ACTIVITY 11.5: VLMIS EXPLORER

Time: 25 MINUTES

Show Slide # 29 Other Reports-Menu items.

Orientation to users and introduces them about Reports and its working. The objective of this activity is to train users about generating data reports.

Show Slide # 30 Central/Provincial Warehouse Report: Filters

Tell users about filters and explain the Year, Indicator and Warehouse filters. Explain the users how to filter values based on Year, Indicator and Warehouse.

- Year: displays the list of Year
- Indicator: displays the list of indicator.
- Warehouse: displays the list of Warehouse.

Tell users to click GO to generate report.

Show Slide # 31 Central/Provincial Report-Screen Orientation to users and introduces them about Report and its working.

Exercise # 11.5: Ask users to use current month and year to explore a Union Council of their district in LMIS explorer.

SESSION 12: GRAPHS

Time: 110 Minutes

SESSION OBJECTIVES

By the end of the session participants should know:-

- How to generate Comparison Graphs
- How to generate Simple Graphs

DOCUMENTS TO BE DISTRIBUTED

- Users Guide
- Graph generation exercises
- Presentations

MATERIALS REQUIRED

- Laptops for each participant (with external mouse, Microsoft Office 2007 or above, Firefox, Wi-Fi)
- Screens with Multimedia

PRESENTATIONS REQUIRED

- Graphs Overview
- Simple Graphs Overview
- Comparison Graphs Overview

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 12.1: INTRODUCTION AND LOGIN

Time: 20 Minutes

The objective of this activity is to give users an idea about generating graphs.

Show Slide # 3 **Graphs Overview**, tell users who can generate Graphs for analysis.

Show Slide # 4 explains **Graph Menu** items and tell them how to reach the screen of Simple Graphs.

Exercise # 12.1: Ask users to login with Username: guest, Password: guest.

ACTIVITY 12.2: SIMPLE GRAPHS

Time: 30 Minutes

The objective of this activity is to train users about generating Simple Graphs.

Show Slide # 5 **Simple Graph Screen Introduction** to users and tell them about Simple Graph screen and its working.

Show Slide # 6 **Selection bar** to users and introduce them about Selection bar options.

Tell users that the Selection Bar in the Simple Graphs includes different filters and select option to generate graphs. Inform users about the elements of the Selection bar.

Show Slide # 7 **Simple Graph Indicators** to users and introduce them about Indicator options.

Tell users that clicking the **Indicator** drop-down displays the indicator options. Users can select one of the following options from the list;

- **Consumption**: tell users to select this option to plot a graph for Monthly Consumption.
- **Average Monthly Consumption**: tell users to select this option to plot a graph for Average Monthly Consumption.
- **Months of Stock**: tell users to select this option to plot a graph for Months of Stock.
- **Stock On Hand – UC**: tell users to select this option to plot graph for Stock in Hand for UC.
- **Stock on Hand – District**: tell users to select this option to plot graph for Stock in Hand for District.
- **Stock on Hand – Total**: tell users to select this option to plot graph for Total Stock in Hand.

Show Slide # 8 **Geographical Options** to users and introduce them about Geographical Options.

Tell users about the following **Geographical** drop-down **options**:

- **National**: tell users that selecting this option selects only National level data.
- **Provincial**: tell users that selecting this option selects only Provincial level data.
- **District**: tell users that selecting this option selects only District level data.

Show Slide # 9 **Products** to users and introduce them about different products.

Tell users about **Products** list. Explain to them how they can select one or multiple products in the Products list.

Show Slide # 10**Time Interval** to users

Tell users about **Time Interval** drop-down. Explain to them how selection of different time interval will impact the graph.

- **Quarter**
  First Quarter
  Second Quarter
  Third Quarter
  Fourth Quarter
- **Half**
  First Half
  Second Half
- **Annual**

Show Slide # 11 **Generate Report with Year** and **Chart Type** and **Generate** button to users.

Tell users about **Year** drop-down. Explain to them how selection of different years will impact the graph.

Tell users about **Chart Type**. The Chart Type drop-down list enables them to select either Bar or Line chart for plotting format options. Select the required type.

Tell users about clicking the **Generate** button for plotting the graph.

Show Slide # 12 with a generated **Simple Graph**.

Explain to users the simple graph that has been generated by correlating with selected options.

Exercise # 12.2: Ask users to open exercise sheet 12.2 and generate a simple graph

ACTIVITY 12.3: COMPARISON GRAPHS

Time: 20 Minutes

The objective of this activity is to train users about generating Comparison Graphs.

Show Slide # 13 **Comparison Graphs, to** users and tell them how to reach the screen of Comparison Graphs.

Show Slide # 14 **Comparison Graphs Screen** introduces users about Comparison Graph screen and its working. Tell them that the Comparison Graph Report provides representation of data in a visual format that can help you see overall trends easily based on indicators, geographical options and time interval.

Show Slide # 15**Selection bar** to users and inform them about Selection bar options.

Tell users that the Selection Bar in the Comparison Graph Report includes different filters and select option to compare graphs to generate reports. Inform users about the elements of the Selection bar.

Show Slide # 16 **Comparison Graph Indicators** to users and introduce them about Indicator options.

Tell users that clicking the **Indicator** drop-down displays the indicator options. Users can select one of the following options from the list:

- **Consumption**: tell users to select this option to plot a graph for Monthly Consumption.
- **Average Monthly Consumption**: tell users to select this option to plot a graph for Average Monthly Consumption.
- **Months of Stock**: tell users to select this option to plot a graph for Months of Stock.
- **Stock On Hand – UC**: tell users to select this option to plot graph for Stock in Hand for UC.
- **Stock on Hand – District**: tell users to select this option to plot graph for Stock in Hand for District.
- **Stock on Hand – Total**: tell users to select this option to plot graph for Total Stock in Hand.

Show Slide # 17 **Compare Options** to users and introduce them to Compare Options drop-down.

Tell users about the different **Compare Options** in the drop-down and how it affects the graph report.

Show Slide # 18 **Compare Options** with **Year – National** to users and tell them about the Year – National option.

Explain to them that selecting **Years – National** in the list enables you to compare National level data for the selected years, and displays the Years list. Tell users that selecting this option displays the Years list on the bottom. You can select multiple list entries (years) from the Years list for side by side comparison of National level data for the selected years.

Show Slide # 19 **Comparison Graph** sample for **Average Monthly Consumption** for **Year – National**, Time Interval: **Annual** and Years: **2012** and **2013** selected as an example and explain them about the graph selection.

Show Slide # 20 **Compare Options** with **Year – Provincial** to users and tell them about the Year – Provincial option.

Explain to them that selecting **Years – Provincial** in the list enables you to compare Provincial level data for the selected years, and displays the Years list.

- Tell users that selecting this option displays the **Years** list on the bottom. You can select multiple list entries (years) from the Years list for side by side comparison of Provincial level data for the selected years.
- Tell users that selecting this option displays a **Province** drop-down for selecting the required province.

Show Slide # 21 to show generated **Comparison Graph** where years are on x-axis in separate colors

Show Slide # 22 **Compare Options** with **Year – District** to users and tell them about the Year – District option.

Explain to them that selecting **Years – District** in the list enables you to compare District level data for the selected years, and displays the Years list.

- Tell users that selecting this option displays the **Years** list on the bottom. You can select multiple list entries (years) from the Years list for side by side comparison of National level data for the selected years.
- Tell users that selecting this option displays a **District** drop-down for selecting the required District.

Show Slide # 23 **Years – District** to show generated **Comparison Graph** where years are on x-axis in separate colors

Show Slide # 24 **Compare Options** with **Geographical – Provincial** to users and tell them about the Geographical – Provincial option.

Explain to them that selecting **Geographical – Provincial** in the list enables you to compare Province level data side by side for the selected time interval.

Tell users that selecting **Geographical – Provincial** option displays the **Province/Regions** list on the bottom. You can select multiple list entries (Province/Regions) for side by side comparison of Provincial level data for the selected time interval.

Show Slide # 25 to show generated **Comparison Graph** where provinces are on x-axis in separate colors

Show Slide # 26 **Compare Options** with **Geographical – District** to users and tell them about the Geographical – District option.

Explain to them that selecting **Geographical – District** in the list enables you to compare District level data side by side for the selected time interval.

Tell users that selecting **Geographical – District** option displays the **Districts** list on the bottom. You can select multiple list entries (Districts) from for side by side comparison of District level data for the selected time interval.

Show Slide # 27 **Comparison Graph** to show generated **Comparison Graph** where districts are on x-axis in separate colors

Show Slide # 28 **Products** to users and introduce them about products.

Tell users about **Products** list. Explain to them how they can select one or multiple products in the Products list.

Show Slide # 29**Time Interval** to users.

Tell users about **Time Interval** drop-down. Explain to them how selection of different time interval will impact the graph.

- **Quarter**
  First Quarter
  Second Quarter
  Third Quarter
  Fourth Quarter

- **Half**
  First Half
  Second Half

- **Annual**

Show Slide # 30 with **Year** and **Chart Type** and **Generate** button to users.

Tell users about **Year** drop-down. Explain to them how selection of different year will impact the graph.

Tell users about **Chart Type**. Tell users that Chart Type drop-down list enables them to select either Bar or Line chart for plotting format options. Select the required type.

Tell users about clicking the **Generate** button for plotting the graph.

Show Slide # 31 with a generated graph.

Exercise # 12.3: Ask users to open exercise sheet 12.3 and generate a Comparison graph.

SESSION 13: VLMIS TROUBLESHOOTING

Time: 30 Minutes

SESSION OBJECTIVES

By the end of the session participants should know:-

- How to troubleshoot vLMIS
- How to contact vLMIS Support Team

DOCUMENTS TO BE DISTRIBUTED

- Users Guide
- Presentations

MATERIALS REQUIRED

- Laptops for each participant (with external mouse, Microsoft Office 2007 or above, Firefox, Wi-Fi)
- Screens with Multimedia

PRESENTATIONS REQUIRED

- vLMIS Troubleshooting

TRAINER PREPARATION

- Prior to starting the session, the trainer(s) must be sure that all materials and equipment's needed for the session are ready at hand.
- If the session is planned to be co-facilitated, the co-facilitators should decide, before the session, who will facilitate which part of the session and take preparation accordingly.

ACTIVITIES

ACTIVITY 13.1: CONTACTING SUPPORT FOR TROUBLESHOOTING

Time: 20 Minutes

The objective of this activity is to give contacts for contacting vLMIS support team in case of any troubleshooting.

Show Slide # 1 **vLMIS Troubleshooting**, tell users about basic troubleshooting possibilities.

Show Slide # 2 and give them the contacts of key support personnel for vLMIS:

For Software related Issues or Feedback, e-mail at webmaster@deliver.org.pk or call the following numbers:

Important Numbers

Iftikhar Bin Niaz (Punjab)	0300-9709701
Tasleem Akhtar (Sindh & Baluchistan)	0321-3448888
Saqib Rahim (AJ&K,GB and ICT)	0345-2400162
Abbas Khan (KPK & FATA)	0300-5992960
Saif ur Rab	051-2555425-6
Wasif Raza Mirza	051-2555425-6

SECTION TWO

TRAINING AND COMMUNICATION SKILLS MODULES

Table of Contents

SECTION 2

TRAINING AND COMMNUNICATION SKILLS MODULES

This section provides training on the communication element modules of vLMIS.

IMPORTANT MESSAGE TO TRAINERS

The following schedule is based on a training of 20 participants. It was estimated that the average size of the training group would be between 20 and 25 participants. This schedule can therefore be adapted to meet different sized groups.

In addition to the modules that instruct participants how to train there are practice sessions for the participants. These practice sessions give participants the opportunity to stand up and present allocated material to the group. The JSI training staff and the other colleagues in the room will offer feedback to the presenters after they have finished with each presentation. The feedback should be constructive and offer points to help the new trainers improve. (See details within these modules)

If the JSI staff feels that the practice session was not done to the appropriate standards they will ask the participant to do another presentation at a later time. Trainers may need to have the presentation done after normal workshop hours.

> Participants who do not do satisfactory presentations should not be allowed to become trainers themselves.

Here is how the practice presentations are set up. Again, this can be adjusted for any number of participants. In the example here we assume 20 participants, and this is how the below schedule is determined.

There are 20 participants that each conducts one practice presentation; the presentation will be of 10 minutes each with 5 minutes of feedback from the JSI staff and colleagues in the room.

Because this is a TOT there will be need for flip chart paper markers and tape for practice sessions. Even though many presentations will be done on the computer be sure to bring extra supplies for these practice sessions.

Modules which are the TOT or Communications elements.

MODULE 1: DIFFERENCE BETWEEN TOT AND THE VLMIS COURSE

Objectives: At the end of this module, participants will be able to:

Explain the difference between the TOT they are participating in and the course they will be training, including the "Modules" and "Sessions."

Total Time: 10 Minutes

Materials: Flip chart, markers

Hand-outs: Everything is in the Participant Workbook

Prepared Flipcharts: No flip chart needs to be written in advance

Trainer Note: The Module is written to introduce a TOT for the vLMIS course, but with slight modifications, it would be appropriate for introducing TOTs for other courses.

LEARNING ACTIVITIES SUMMARY

No.	Title	Type	Time
1	Explanation of Differences between the TOT and the Course that they will be training, including Modules vs. Sessions	Lecturette, Q&A	10 min

ACTIVITY: EXPLANATION OF DIFFERENCE BETWEEN THE TOT AND THE COURSE THAT PARTICIPANTS WILL BE TRAINING (LECTURETTE)

TIME: 10 MINUTES

- The trainer uses a flip chart to write the words "Module" and "Session" in very large letters on separate lines. The trainer explains that during the TOT some of the time they will learn how to train. And some of the time they will be learning exactly what they will train in the course they present to the people they train.

- The trainer should point to the word "Module" and write under it "How to Train" and then under the word "Session" the trainer should write "What to Train."

- At this point, it is good to pause and let the participants think about what was just said.

- After a brief pause, explain that this means the participants have to learn not only the technical content, but also they have to learn how to train. They will learn that the system used in the training is called Adult Learning Theory, or ALT, and they will be learning a good bit about it. They may have already noticed that the training so far is different from what they might be used to. It is very active and applied.

- The trainers will always tell the participants if they are doing a Module or a Session. So far they had one Session, and it was Session 1. (Point to **Session** on the flip chart). It is a Session exactly like what they will be doing when they train people. There are different Sessions in the course they will train people in at the end of the TOT. The TOT trainers will present all of them, and participants will receive a Facilitator Manual that gives them all the Sessions so they can present what is in the Participant Guide that they have already received.

- But right now, the trainers are not doing a Session. We are presenting a Module. It is Module 1. (Point to **Module** on the flip chart.) The participants will not be training people in what we are saying right now, because it is for trainers, not for the people that they will train. This is just a short module so that you understand how the course will give you the Sessions that you will train other people in and also will give you the Modules that help you learn how to train.

- Pause again and ask if there are questions. If there are questions, process them interactively as far as possible. ("Process interactively" means that most of the time, the trainer does not give a direct answer but asks if the other participants have an answer. After that, the trainer asks if the participant's answer was correct. As much as possible, encourage the participants to share and participate.) There are a few exceptions:

    - If you have little time left, you cannot be as interactive.

    - If the group is agreeing on something that is not true, the trainer must correct the misinformation.

    - If no participant has an answer, the trainer must give the answer or put the item on the parking lot.

- Assure participants that the difference between Session and Module will become clearer when they receive their Trainer Guide, but right now they are starting out with several of the Sessions very much like the people they will be training. They are having the same experience.

MODULE 2: INTRODUCTION TO "CAN TALKS"

TRAINER NOTE

The length of time for Module 2 will vary, depending on how many participants are in the course and whether two can talks are required as a course competency or if only one is. The time breakdown is 3 minutes of Can Talk plus approximately 2 minutes of feedback for each participant in the course. Note that not all the participants need to do their can talk in the same training period. Some can continue later in the day or the next day.

Objectives: At the end of this Module, participants will be able to stand up and complete a short extemporaneous talk while adhering to basic presentation standards

Total Time: 75 minutes (time will vary based upon number of participants)

Materials:

- Time keeping bell or colour sheets. Another TOT trainer should serve as time keeper. (It may be possible to orient a participant to do this role during this module so that if well done, it would count as one of that person's trainer role requirements.)
- A chair placed at the front of the room near the table with the can or container mentioned below. The chair is for the participant to sit down when doing his or her self-critique.

- Strips of paper with the can talk topics written on them. The strips should be well folded. The topics are made up by the trainers and should be subjects that anyone can easily speak on. See a list of suggestions at the end of this session. The topics need to be cut up and made into strips. Topics can be added, changed or dropped by changing the strips, even if some of the topics are just written out by hand with very clear hand writing.
- A can or other container to hold the strips of paper. A container reflecting the national culture may be appreciated, such as a small basket or carved box, but a large manila envelope will do as needed.

Handouts: There are no handouts for this module.

Prepared Flipcharts: Two flipcharts are to be prepared in advance. They are in the boxes in Activity 1 below.

Learning Activity Summary:

No.	Activity	Type	Time
1	How to Give "Can" Talks	Demonstration	10 min
2	Feedback After the First "Can" Talk	Large Group Discussion	5 min
3	Presenting "Can" Talks	Large Group Activity	30/45 min
4	Presenting "Can" Talks, Continued	Large Group Activity	30/45 min

ACTIVITY 1: HOW TO GIVE "CAN" TALKS DEMONSTRATION

Time: 10 Minutes

Begin by explaining to participants that one of the requirements to receive a certificate for the course is doing two successful can talks. If a can talk is not judged successful, they will be able to try again.

- First of all, explain these interesting facts about speaking in public:
    - It is very stressful for most people to stand and speak to a group, even if they know the people they are speaking to.
    - Trainers have to do a lot of standing and speaking to groups.
    - If you have less stress when you speak, you will do better.
    - If you have practice, you have less stress.
- This exercise with "Can Talks" is your first and easiest exercise in speaking to groups.
- It is very simple practice speaking to the group. The talks are called "can" talks, because it means that you "can" talk. You are capable of talking to a group. It takes effort, and most people feel a little nervous. Some feel very nervous.
- But we want as many of you as possible to get in some practice speaking to a group on your first day of this course. If we do not have time for everybody to speak today, we will make some time tomorrow for the additional can talks.

- Here is what you do to give a can talk. The trainer displays the first of two flip charts prepared in advance. It looks like this:

> 1. Pick a topic on a piece of paper out of the container, and read it.
> 2. If you like the topic, read it out loud to the group.
> 3. If you don't like it, you may pick another topic.
> 4. You may go back to your first topic, but you may not pick out a third topic.
> 5. Speak for three minutes on the topic.
> 6. When you finish, sit down in this chair, and give yourself feedback first. Then others may give you their feedback.

- Explain the six points to the participants. (Explain and comment on them. Do not read them word for word.)

  I. Show them what to do by picking a folded strip of paper out of the container. Read it to yourself first. "For example, if my topic was 'In recent years, there have been changes in the place where I live,'" I would read the topic to myself first.

  II. If I wanted it as my topic, I would then read it out loud to the group, and begin my talk.

  III. If I didn't like that topic, I would pick another topic. (Demonstrate by picking another topic out of the container.)

  IV. But I could go back to the first topic. And no, I can't look at a third topic. Notice that if I don't like a topic, I can make a change to it. For example, if the topic was, "What is something that you like to cook?" I could say that I am not a cook at all and tell about how I have had various failures at cooking or how I would like to learn to cook. Or maybe I could tell something I like to eat instead of something I like to cook.

  V. Then I would speak on the topic for three minutes, using my imagination. The time keeper would give me a one minute warning with the bell (or the yellow card) and then call time after three minutes. (Have the time keeper demonstrate with a soft ring of the bell for one minute left, and a loud ring of the bell after three minutes, or the yellow card when there is one minute left, and the red one for "STOP" at the end of three minutes.)

VI. Then I sit down right here. (The trainer sits in the chair that has been placed in the front of the room.) and I begin my self-critique. I say how I did a good job or did not, based on the three main requirements for can talks, Speak loud and clear, Look at people all the time, Use your imagination on the topic.

Now let's look at those three points that you have to watch. (The trainer displays the second of the two flipcharts prepared in advance.)

1. When you do a can talk, here are the only three things you need to worry about. If you take care of them, you will get credit for your “Can talk”. Then the trainer displays the second flipchart that was prepared in advance.

- SPEAK LOUD AND CLEAR
- LOOK AT THE PEOPLE ALL THE TIME
- USE YOUR IMAGINATION FOR THREE MINUTES

The trainer gives these examples:

1. **Speak Loud and Clear** means that the people in the back of the room and everywhere can hear you easily. If people can't hear you, you aren't training them.
2. **Look at the people all the time** means that your eyes are looking at the people in the room almost the entire time. You may glance down at your topic for a second, but most of the time you are looking at the people on the right, on the left, in the front, in the back and in the middle. You do not look at your hands, or the floor, or the back wall. You look at the people. Don't leave anybody out. Keep looking at them. There is nowhere else you should look. Make sure you see everybody.
3. **Use your imagination** means that you keep on talking about your topic. You use your imagination to find different things to say about it. Don't worry about <u>exactly</u> what the topic means. Don't worry if it is OK to treat the topic in one way or another way.

For example, if the topic was "My Favourite Shop," I wouldn't have to be concerned about what kind of a shop it was, or if I could say I have several favourite shops. You could even tell why you don't like shops. Use your imagination and keep talking!

- Now let's have a volunteer who will be the first to come up, pick a topic, and give a can talk that will follow the three required rules. Then you sit down and self- critique. “We should be very kind to the first person who is the pioneer. We will give them applause and not be very critical. May we have a volunteer, please?”
- If after a few minutes, you have no volunteers, and then invite a particular person. Use an invitation such as this, “I know that there are some people in here who are often quiet, but this is a real good chance to practice talking to the group and be the first to finish one of the course requirements. Who wants to be the pioneer?”
- Or you could say something like…. “Ladies often end up being very good trainers and I would like to see a lady get an early start today. Is there a lady here who would like to be our first presenter today?”
- From time to time, the trainer may have to be more forceful with some groups and gently suggest a name. If the group still doesn't start, then the trainer may just have to recruit a "volunteer." In that case, the trainer would say something like, "Well, I know this is the first day. It is hard to get started. So I am going to appoint somebody to be our pioneer. After that everybody will want to give a can talk. So, Elias, I want you to come up and do the first can talk. Ladies and gentlemen, let's encourage Elias and give him a round of applause for starting!"
- If the first participant or any participant falters or stops, encourage them to continue, even giving a suggestion about how they could use their topic. But remember that in every group there may be a person who cannot finish the can talk the first time. If that happens, be very gentle with the person. Make comments on how it must have been hard, on how they got a good start, on how they will surely do better the next time, etc.

ACTIVITY 2: FEEDBACK AFTER THE FIRST "CAN" TALK – LARGE GROUP DISCUSSION

TIME: 5 MINUTES

- At the end of the first can talk, the trainer needs to very briefly review the process so that everybody remembers how it works. Here is an example of how to do that.

  "OK, Elias, I believe you did a good job. Now you get to sit down on the chair by the flip chart so that you face us. First you self-critique for one minute. You tell us how you thought you did by looking at the topics on the flip chart (but make sure you look mostly at us while you talk.) How were your voice, your eye contact, and your imagination? After your self-critic, you may ask participants to make comments on your can talk. But we will hear from you first:"

- After Elias self-critiques, you could make a comment like this.

  "OK, Elias, now do you want to ask your colleagues here what their comments are on these three points?" If Elias gets no responses, the trainer intervenes and asks participants what they saw in terms of voice, eye contact, and imagination."

- It may not be necessary for the trainer to give any comments. Rarely, however, the trainer may have to balance the feedback from participants to make it more positive or to say that, yes, the talk was good in some ways, but the participant can really do a better job next time, etc. Do not let a poor can talk, one that does not follow the three rules, be accepted as good for credit. Keep the course standards high.

- When you go to recruit the second participant to give a can talk, ask who will be the third, fourth, and fifth, etc. Write the names down on a flipchart. Always keep a running list of the people who are next in line. This will save time so you don't have to stop and recruit each time.

- The trainers need to keep a separate list in a notebook of who has done successful can talks and met other requirements so that it is clear who gets a certificate.

ACTIVITY 3: PRESENTING "CAN" TALKS – LARGE GROUP ACTIVITY

TIME: 45 MINUTES

- Once the can talks begin, the trainer has a lot less to say. Here are the general points:
    - Keep going back to the flip chart with the three major points (Voice, Eye Contact, and Imagination) as often as needed to keep the feedback on these items. Don't allow feedback on other points now. That will come with the Practice Presentations.
    - Help out the time keeper as needed so that time is not wasted. <u>Three minutes</u> for the can talk and <u>two minutes</u> more for self-critique and feedback from the group for a total of five minutes. This means you usually do twelve participants in an hour. You need to stay on time and keep the exercise moving along. Use a break out room for a second room as needed.
    - Try to get participants to facilitate their own feedback, asking their colleagues for comments and using their two minutes of feedback time effectively. This is good practice for them. Of course sometimes it is not feasible to let them facilitate their own feedback, and the trainer needs to intervene.
    - Try to let the participants give most of the feedback. It is better if the trainer has fewer comments to make, or when everything important has been said, none at all
    - Don't let a poor can talk be acceptable. You may have to intervene and gently tell a participant that he or she had some strong points, etc., but you are sure that they can do a better job and you want them to try again.
    - Make sure to keep a list of all the participants who have passed their can talk requirement.

ACTIVITY 4: "CAN" TALKS, CONTINUED – LARGE GROUP ACTIVITY

TIME: 45 MINUTES

- Very soon the training team for the TOT needs to decide if there will be time and the group really needs two required can talks. The requirement for a second can talk may be dropped if it is clear that the group is doing fine. It might have to be dropped if there are a lot of repeat can talks needed and there will not be time. Once the training team has made the decision, it should be announced to the group of participants.

- Activity 4 is identical to Activity 3. It is a continuation of it and will be done on Day 2 of the course. Any participants who did not succeed in their first efforts will have a second chance at this time. If there is not enough time for all participants to do their can talk, they may have to be individually scheduled in Day 3 or later. A can talk can be done easily during the morning opening, just before or after lunch or a break. They are also an excellent way to use a few minutes when a part of the course ends early.

Potential Topics for Can Talks

1. My best day at work ever
2. A favorite recipe that I love to make
3. My best supervisor
4. A favorite hobby
5. My favorite place in Pakistan
6. I'm proud of my country because...
7. My favorite course in school was...

MODULE 3: EXPERIENTIAL LEARNING CYCLE

TIME: 45 MINUTES

SESSION OBJECTIVES

By the end of the session participants will be able to:

- List the steps of the Experiential Learning Cycle
- Demonstrate an understanding of the Experiential Learning Cycle by relating it to actual situations
- Identify training techniques provided for the greatest retention rates
- Express an understanding of the importance of using experiential learning.

Materials Required
Flip Chart of the ELC
Learning pyramid on newsprint (without answers)
Participant's Module Guide

TRAINER PREPARATION

Prepare flip charts of the Experiential Learning Cycle and the Learning Pyramid.

LEARNING ACTIVITIES SUMMARY

Title	Type	Time
1. How We Learn/ELC	Group Discussion	10
2. The Learning Pyramid	Exercise and Discussion	20
3. Application of ELC to Training	Discussion	15

LEARNING ACTIVITIES

ACTIVITY 1: HOW WE LEARN/ELC – DISCUSSION

TIME: 10 MINUTES

Trainer asks participants to take a few minutes to think and note down the steps of how they learned to do something such as ride a bike or drive a car. Ask a few participants to share their learning experiences.

Example: you have been watching the other kids do it and you get on a bike and fall down (Experiencing); you go and cry to your father that you fell down and he asks you exactly what happened (Processing); you decide with your father's help that you fell down because you were not peddling fast enough and that you need to do so next time (Generalizing); you get on the bike again and start peddling fast (Applying).

Trainer shows the experiential learning cycle drawn on a flip chart, and asks Participants to open their Module Guide the page titled Experiential Learning Cycle. Discuss main points. Then using the participants' learning experiences they described, relate the events mentioned in terms of the cycle.

Trainer asks participants: How does experiential learning relate to the principles found in Adult Learning Theory? Answers sought are: Experiential learning allows adults to solve a problem, simulated or real, adults will be orientated to learning if they know that they will be able to immediately apply this new information, the processing part of ELC should allow the participants in a training to learn from each other.

Review the role of the trainer in each quadrant of the ELC. (Motivator – Teacher – Coach – Observer)

ACTIVITY 2: THE LEARNING PYRAMID – EXERCISE AND DISCUSSION

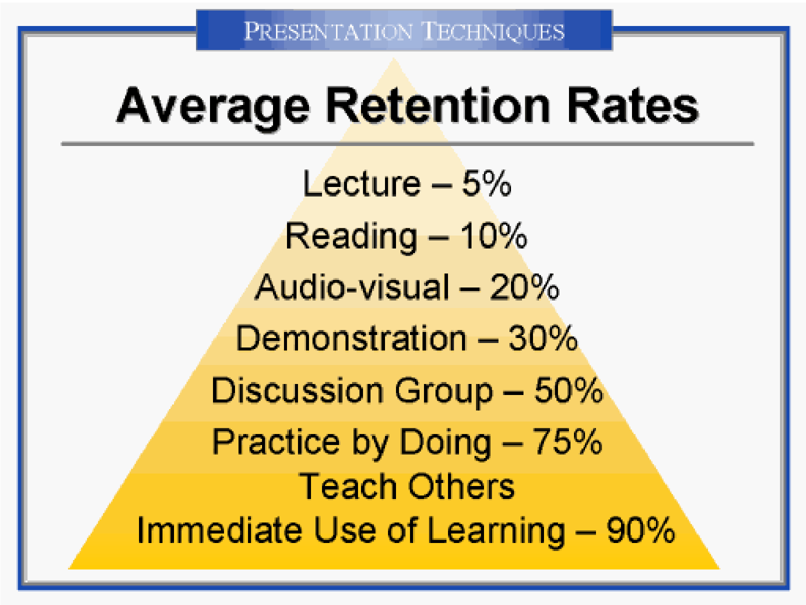
TIME: 20 MINUTES

Before beginning this activity, have a version of this learning pyramid on newsprint, without the answers.

Explain that there has been research done on different teaching/learning techniques used frequently in training adults. Ask the participants to open their **Module Guide** the page titled **The Learning Pyramid Worksheet,** ask participants to complete the exercise writing the teaching method next to the percentage of learning retained.

Remind participants to think about the principles of adult learning and experiential learning cycle in considering their answers. Give them a maximum of five minutes to do the worksheet.

Elicit answers, starting with 5 %. After hearing a few different possibilities, write the correct answer on the pyramid. Follow the same procedure for the remaining percentages in the learning pyramid.



Relate the learning pyramid to the principles of adult learning and the experiential learning cycle, pointing out that at the lower percentages there is much less activity on behalf of the learner, whereas the last three learning methods require active participation on behalf of the learners as well as working in teams and being held accountable for one’s own learning experience. Note that using a combination of different activities can result in a higher retention rate, closer to 100%.

ACTIVITY 3: APPLICATION OF ELC TO TRAINING DESIGN – DISCUSSION

TIME: 15 MINUTES

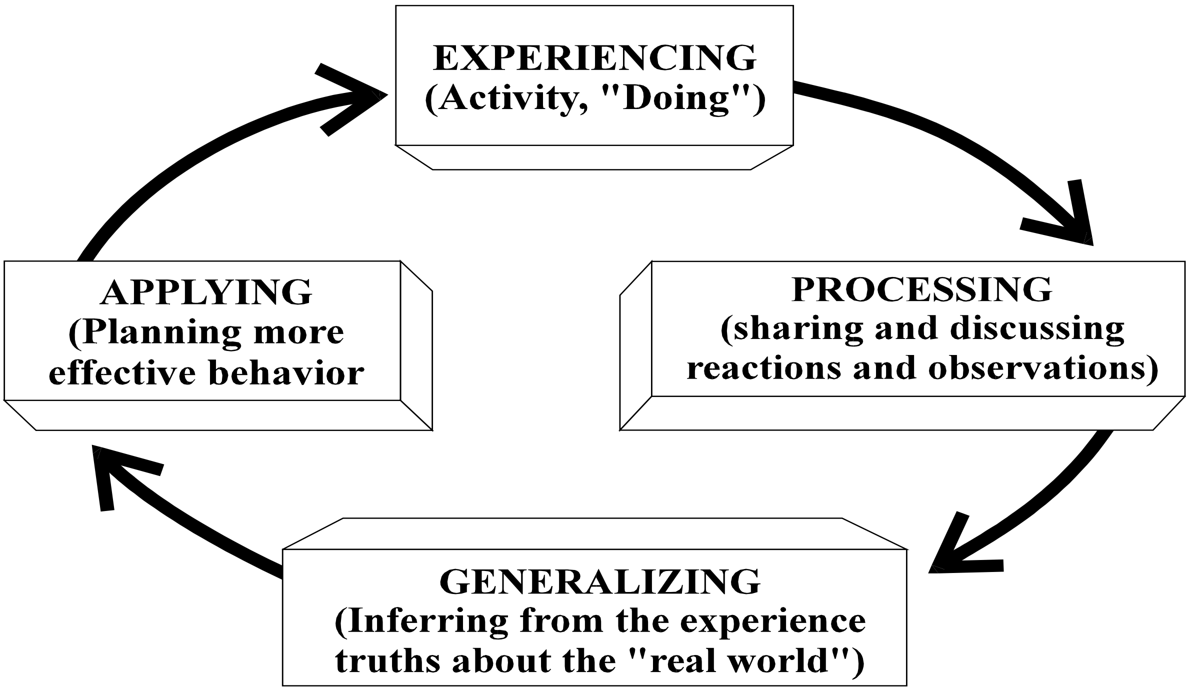
Ask participants how they can use what they know about adult learning and the experiential learning cycle in the training they do. Ask the participants how these theories imply when they are teaching or using any training materials.

Discuss making the following points:

- Training is designed to allow learners to address immediate problems; please it is not safe to change the timing of sessions without a critical thinking.
- Training activities is designed to allow learners to share their previous experiences and build on them
- Training is designed to allow participants to be actively involved as the training proceeds
- Training activities are put together to take participants through as much of the ELC as practical.

Summarize and answer any remaining questions.

EXPERIENTIAL LEARNING CYCLE



Experiencing happens whenever you do something which makes use of learning to date, and by doing, you may well figure out how to do it better. You attempt something, and some evidence is available which indicates levels of success. A great deal of information is available to you (the 'doer'), but its interpretation will be biased according to your previous experience and existing skills.

Processing happens when you reflect on your own (or other people's) past attempts. Depending on how successful you (or they) feel about the action experienced, you may seek ways of improving next time. These ways may include getting advice, reading a book, or accessing guidance in other ways.

Generalizing happens when you start to gather these other inputs or theorizing about a possible model which describes what is happening. They may be your own original thoughts, other people's original thoughts, some ideas gathered from reference material, or a model offered by a teacher or trainer. This phase tends to build understanding.

Applying usually precedes action. It may be based on your experience to date, models derived or the reflective reviews of others. Your planning may focus on a particular aspect of the 'doing', or may be a comprehensive and detailed plan of action. Planning may not be either overt or explicit, but implicit and to a degree sub-conscious.

THE LEARNING PYRAMID WORKSHEET

Research concerning adult learning shows that certain techniques of teaching are definitely better than others. Try to determine which of techniques listed below on this page correspond with the percentage of learning retained through using the technique. Write your answers beside the corresponding percentages.

5% _______

10 % ______________

20 % _______________________

30 % _______________________________

50 % ____

75% ____

90%____

Learning Techniques:

- Audio-visual
- Group discussion
- Demonstration
- Lecture
- Reading
- Practice by doing/teach others
- Immediate use of learning

MODULE 4: TRADITIONAL TEACHING STYLE VERSUS ADULT LEARNING THEORY (ALT)

TIME: 35 MINUTES

SESSION OBJECTIVES

At the end of this Module, participants will be able to:

- List key characteristics of Adult Learning Theory
- Explain how training based on ALT is different from the "traditional" style of teaching.
- Give Examples of the use of ALT in a course

Materials Required
Flip Chart and Tape
Participant's Module Guide

PREPARED FLIPCHARTS

1. Traditional Style Teaching
2. Training Based on ALT

Both flip charts are ready to display with the bottom half taped up covering the top half. Or they can be covered by blank flip chart sheets.

LEARNING ACTIVITY SUMMARY

No.	Activity	Time
1	What is Adult Learning Theory?	10 min
2	Comparison with Traditional Style Teaching	25 min

ACTIVITY 1: WHAT IS ADULT LEARNING THEORY?

TIME: 10 MINUTES

- The trainer begins by explaining that both this TOT and the course that they are being trained to present are not what might be expected. Both are based on Adult Learning Theory, or ALT. Maybe they have had courses like this before or maybe this is the first time they have had a course using Adult Learning Theory.

- Ask how many people in the room have had experience with courses or workshops in which they come and listen to presenters and write notes for a number of days and sometimes ask a few questions. Probably most people in the room have had training and workshops like that. And many university or professional courses are like that.

- In this course, we are going to call that "traditional" style teaching. Most of us had a lot of it when we were in school. It is what we consider "normal."

- But this course and the course they will be training people in are different. It is not "traditional" style. It is harder for the trainers, but in many ways it is easier for the participants. We are going to look at the differences and some examples, since we will be using ALT. Now let's look at the definition.

Then the trainer asks them to turn to their Participant Modules Guide to Handout.

- The trainer pauses and gives participants a chance to read the definition in their TGs.

- After the participants have had a chance to read the definition in their handout, ask if they have questions. Take a few questions, but also mention that next you will look at a comparison of ALT with traditional style teaching, and that many of their questions will be answered then.

ACTIVITY 2: COMPARISON WITH TRADITIONAL STYLE TEACHING

TIME: 25 MINUTES

- The trainer explains that ALT will become clearer when they have seen it compared with what in this course we will call Traditional Style Teaching. Add that we do not mean that all traditional teaching is bad, but that it is very different, and it is not for skill training for adults. In the comparison that you are going to do, some generalization and exaggeration will be used to make the difference clearer.

- The trainer displays the flip chart on Traditional Style Teaching, and gives brief explanations of the seven points, gradually becoming more and more interactive.

TRADITIONAL STYLE TEACHING

1. Teacher Focused.
2. Participants with Limited Life Experience.
3. One-Way Communication, mostly.
4. Limited learning from classmates.
5. Participants often passive.
6. More theory than application.
7. The content is for the distant future.

As the trainer displays these items, an example of each one will help.

1. Teacher focused means that the teacher runs the class and is clearly the boss. It may even be called David Banda's class or Ruth Phiri's class. The teacher is the focus of attention.
2. Limited life experience means that here the teacher believes that participants have not had much experience in their lives. They do not have a body of life knowledge to use as a basis of new knowledge. They don't know anything, or at least not very much.
3. Ask what participants think "Mostly one-way communication" means. Process the answers and conclude that it means mostly communication going only from the teacher to the student, with occasional exceptions.
4. Ask if with the traditional style you expect to learn much from your class mates. The answers should be that you usually expect to learn only from the teacher since the idea is that participants don't know much.
5. Can participants give an example of how participants can be mostly passive with traditional style? Explain that in simple words passive means just sitting and not doing much. Get some examples from them. Just sitting, just listening, just writing notes, etc. Ask them to be honest and admit if anybody in the group has ever been so passive that they fell asleep in a class?
6. More theory means not much material that is practical for use in your life. Sometimes the course has almost no application to everyday life. Algebra and history do not have a job impact for most people. They are good subjects. But they don't always have an application we will use in our work.
7. Content for the distant future means that what is learned is not for immediate use. It might be used someday, but not in the next week or the next month.

Now explain that you want the participants to look at the poster on ALT and in their **Module Guide**, **Traditional Style Teaching Versus Adult Learning Theory** so that they can make the comparison.

TRAINING WITH ADULT LEARNING THEORY

1. Participant Focused
2. Participants with much life experience
3. Multi-way communication
4. Can learn from colleagues
5. Very active
6. More application than theory
7. The content is for use very soon

a. Give the participants a chance to read the poster, and remind them that the information is in their **Module Guide** and is titled **Traditional Style Teaching Versus Adult Learning Theory.** Now tell them that you would like them to work in groups of four. Tell them that you will give them about five minutes to see if they can work as a discussion group and try to give <u>one or two</u> examples or explanations of numbers 1 through 7. After the discussion groups, you will ask them to give one or two examples from each group. They don't have to go in order of 1 through 7. They can pick any one or two out of the seven.

b. Repeat as needed: Work in discussion groups of four. Discuss for five minutes and try to find examples or explanations of any one or two of the ideas on the list. After the small groups, the trainer will ask you for some of the examples you discussed in the group.

c. Circulate to be sure that all the groups understand. They just need to pick two of the points and agree on some examples of the points. They can pick any one or two points they like. (At this point, they can be very general examples, such as participants can learn from the work and experience of other colleagues, or the topics are not too theoretical but will be used back on the job very soon.)

d. When there is only about a minute of time left, announce to the participants that they need to be ready to give their examples very shortly.

e. Announce to the groups that the discussion time is over. Now you want to hear their examples. Point to the first item on the flip chart. Ask if any of the groups had examples of this. If so, get the examples. (If not, go on to the next point, but try to review all of them in time. The important thing is to get out as many of their examples as possible in the beginning.)

f. Continue going through the list. Process the responses interactively, asking if the other participants agree. Be participant focused, not trainer focused.

g. As needed, go back to any points on the list that did not have examples earlier. See if participants have examples now. In the time you have available, make sure that there is at least one example of each point, but get more than one example if possible.

MODULE 5: FOLLOWING A PREPARED CURRICULUM

Time: 40 Minutes

SESSION OBJECTIVES

At the end of this module, participants will be able to

- Explain the features of a prepared curriculum
- Prepare to train using a prepared curriculum
- Use a prepared curriculum.

MATERIALS REQUIRED

- Trainer Manual

HANDOUTS

- Participants will need their FMs and Module Guides.

PREPARED FLIPCHARTS

- The signup sheet for presenting Practice Presentations

Learning Activity Summary

No.	Activity	Type	Time
1	What is a Prepared Curriculum?	Lecturette, Large Group Discussion	10 Min
2	Ten Steps For Using a Prepared Curriculum.	Individual Study	15 Min
3	Selecting Sessions of the vLMIS Web based Course for your Practice Presentations.	Large Group Activity	15 Min

ACTIVITY 1: WHAT IS A PREPARED CURRICULUM?

Time: 10 Minutes

- Begin by explaining that when the participants train, they will not be making up any training materials. They will use a prepared curriculum. Ask them to turn to Handout 9 of their Module Guide. Ask them to look at their **Module Guide** to the page titled **Ten Steps for How To Follow a Prepared Curriculum.**

- Tell them that you will give them about 10 minutes to read the two pages, and then you will accept their questions, or you will ask them questions if they do not have any.

- While the participants are reading, the trainer should circulate to see that they are all on the right page and how far along they have read. You may need to remind them that there are two pages in this handout.

- For the convenience of the Trainer, the five questions in the participant Module are listed here:

Following a Prepared Curriculum

1. What is a prepared curriculum?
2. Why do I need to follow it?
3. How closely do I have to stay with the curriculum?
4. Can I innovate in a prepared curriculum?
5. Who takes care of the training materials?

- Toward the end of the ten minutes, ask if there are questions or comments about the reading. Process the questions interactively in the time available. If there are no questions, offer discussion questions such as these:

  - Does this mean that you should memorize the Session that you present in the Trainer Guide word for word? (No, you do not memorize it, but you use it to present the material. You have to understand the contents completely, but not by memorization. And you will have the part from the TG on your clip board to look at as you present. Demonstrate how you have this Module clipped to your clip board.)

  - Should you <u>read</u> the parts in the Trainers Guide (TG) to the participants? (No, you <u>explain</u> the parts. The parts are directions for the trainer on how to present. There are very few parts that you say exactly each word.)

  - Should you copy the TG into a notebook? (No, do not copy it. Use it. Underline or highlight parts that you think are important. Write notes in the margin or at the top of the paper, but it is a waste of time to copy it.)

- Mention again to the participants that the trainers of the TOT so far have been using the Trainer Guide. Show them the Module notes on your clip board so that they see you are following TG notes yourself. Show them underlining and highlighting, notes that you wrote in the margins, etc.

ACTIVITY 2: TEN STEPS FOR USING A PREPARED CURRICULUM -- INDIVIDUAL STUDY

Time: 15 Minutes

Explain to participants that they should turn to the next page in their Module Guide

The Ten Steps (for Following a Prepared Curriculum):

- Ask them to skim through the document marking any questions or comments that they may want to present later.
- Give participants some time to read through this handout. For the convenience of the trainer, here is a copy of this handout.

TEN STEPS TO USE A PREPARED CURRICULUM

1. Get your training assignments. Before the course begins, set up a planning day with your colleagues who will train with you. Agree on which specific Activities you will present or co-present in the different Sessions of the course. Notice that the course is divided into Sessions, and the Sessions are divided into Activities. All the trainers have to know all the Sessions and Activities, but the team decides together who will do which specific Sessions and Activities.

2. Study the prepared curriculum for the Session in the TG. Begin your preparation at least one day before you will present. You will do exactly as the curriculum tells you to do, point by point and step by step.

3. Read the pages in the PG which are used for this Session. You need to understand how the PG is used with the TG.

4. Read the TG and the PG together, going back and forth, so that you can see what the participants are looking at while you present the activities in the TG.

5. Underline or use a highlighter to mark points that are especially important or that you want to be sure to remember. Write any notes you need in the margin of the page. Take

the pages out of the binder for the Session that you are doing. Staple the pages, and put them on your clipboard so you will be ready to present.

6. Prepare the flipcharts that are written up in advance.

7. Gather the other training materials that are needed. This is your responsibility.

8. Go through the curriculum as if you were presenting it. Make it a silent practice presentation. Time yourself to be sure that you are not too fast or too slow for the time that is allowed. Repeat this until you are comfortable. Remember that it takes two to four hours of preparation for each hour that you present. Preparation is everything!

9. Do a practice run-through standing up. If it is at all possible, go into the training room, and try to get a fellow trainer to observe. If you can't use the training room, use some other place. Use the flipcharts that you have written up and check to see that you have all the other materials you need. Repeat this practice till you are happy and confident.

10. Do a final silent run-through the day that you will present. Check your timing again. Make sure your flipcharts are ready. Make sure any other materials you need are ready. If you have prepared well, you will do a great job!

Conclude the activity by asking if there are questions or points of clarification that the participants have, and process them interactively. Mention that the first time they prepare with a prepared curriculum will be the most difficult and most time consuming, but soon they will find that it becomes faster and easier.

ACTIVITY 3: LARGE GROUP ACTIVITY - SELECTING SESSIONS OF THE VLMIS WEB BASED COURSE FOR YOUR FIRST PRACTICE PRESENTATION

Time: 15 Minutes

TRAINER'S NOTE

Consider how to divide the participants up. If possible arrange it so that some strong presenters are in each group. This will set a standard and example for others who may need it. Write the names of the participants on the sign-up sheet they will be in and tell them what group they are in.

- Tell Participants how many Practice Presentations they need to do. For the vLMIS course they need to do one Can Talk and two acceptable Practice Presentations.
- Since many of the Activities in the curriculum are over 20 minutes long, they will ask how they can do the activity in 20 minutes. Tell them that you will explain in just a few minutes.
- Explain to them that they have to do the Practice Presentations on certain Sessions of the course. These are the Sessions that are a bit more technically challenging. Explain that each participant will need to do at least one of their practice presentations from different Sessions. Write these on a flipchart.
- Tell them they choose a session and write the Session number and Activity on the chart. They will have 10 minutes to cover the active parts of the Activity. This will be explained shortly. When they are finished presenting they sit down and give a self-critique. The other participants and the trainers will then offer their critiques for up to a total of 5 minutes. Each presentation will therefore be 15 minutes.

- Put up this flipchart prepared in advance, but make sure you have put in the correct time slots, with the first practice presentations with the large group so that everybody sees how the presentations are done and how the feedback is given. Inform participants that they will practice teaching in three small groups. Each participant is expected to do three presentations (1 individually, two co-teaching).

> You will need at least two pages of these sheets for the first practice presentations. Then you will need another sheet or two for the second practice presentations.

[TRAINERS: THIS IS ONLY A SAMPLE. MAKE UP APPROPRIATE TIME SLOTS]

Group A

FIRST PRACTICE PRESENTATIONS

20 MINUTES WITH 10 MINUTES FEEDBACK

Participant Name	Session and Activity Number (Example: Session 5, Act 3)	Time Slot Available (Sample times)
		8:45 - 9:15
		9:15 – 9:45
		9:45 – 10:15
		10:15– 10:35
Break	**Break**	10:35- 10:50
		10:50 - 11:20
		11:20– 12:50
LUNCH	**LUNCH**	12:50 – 1:50
		2:00 – 2:30
		2:30– 3:00
Break	**Break**	3:00- 3:15

[TRAINERS: THIS IS ONLY A SAMPLE. MAKE UP APPROPRIATE TIME SLOTS] Group B FIRST PRACTICE PRESENTATIONS 20 MINUTES WITH 10 MINUTES FEEDBACK		
Participant Name	**Session and Activity Number** **(Example: Session 5, Act 3)**	**Time Slot Available**
		8:45 - 9:15
		9:15 – 9:45
		9:45 – 10:15
		10:15– 10:35
Break	**Break**	10:35- 10:50
		10:50 - 11:20
		11:20– 12:50
LUNCH	**LUNCH**	12:50 – 1:50
		2:00 – 2:30
		2:30– 3:00
Break	**Break**	3:00- 3:15

[TRAINERS: THIS IS ONLY A SAMPLE. MAKE UP APPROPRIATE TIME SLOTS] Group C FIRST PRACTICE PRESENTATIONS -- 20 MINUTES WITH 10 MINUTES FEEDBACK		
Participant Name	**Session and Activity Number** **(Example: Session 5, Act 3)**	**Time Slot Available**
		8:45 - 9:15
		9:15 – 9:45
		9:45 – 10:15
		10:15– 10:35
Break	**Break**	10:35- 10:50
		10:50 - 11:20
		11:20– 12:50
LUNCH	**LUNCH**	12:50 – 1:50
		2:00 – 2:30
		2:30– 3:00
Break	**Break**	3:00- 3:15

- Explain to participants that they do not have to sign up immediately. They may sign up as they leave the room this afternoon or early in the morning.
- Right now you want to give them some time to begin selecting and preparing their first practice presentation while you are there as trainers to help them.
- Tell them that you have two more points that you want to share with them. The first has to do with the length of the Practice Presentations.
    - Practice Presentations are partly artificial.
    - For the first Practice Presentation, you get 20 minutes, even if your Activity is longer than 20 minutes.
    - Do not try to go very fast so that you finish in time.
    - You just do what you can really do in twenty minutes, following the curriculum, and then you stop.
    - You need to do the "**active**" parts of the curriculum during your 20 minutes. This is where you speak and explain the material and get questions from the large group.
    - You **don't do** the more "passive" parts where people do calculations or work in small groups. You just introduce those parts, give the participants the assignment, and then the participants and trainers pretend that they have completed the assignment or small group work and are now ready for the big group again.
    - Briefly go through handout the **Criteria for Acceptable Practice Presentations** in the **Participants Module**. Tell the participants that **this is what will be used to evaluate them**.

The second point you want to tell them is that you want them to study the next two pages in their Module Guides: **Some Basic Principles of Presenting Training** and the following **Platform Skills for Presentations.**

These are on Presenting Training and on Platform Skills for Training. You have used some of them in Can Talks, and your trainers have been showing you these principles all along. Please read these documents tonight.

Conclude by taking any questions the participants have. Make sure they understand that they will begin preparing now, but that they will have to continue with more preparation in the evening. Remind them that they will be evaluated based on the Criteria for Acceptable Practice Presentations.

MODULE 6: ZAPP! AS APPLIED TO TRAINING

Time: 35 Minutes

SESSION OBJECTIVES

At the end of this module, participants will be able to

- List ZAPP! feedback principles as applied to training
- Give effective feedback using ZAPP! principles
- Receive feedback based on ZAPP! principles

Materials Required
Two Blank Flipchart Stands with paper and markers

Prepared Flipchart

A Recipe for ZAPP! under Activity 2

Trainer Preparation

It is a good idea to recruit your fellow trainers to be available to write up the two flip charts on worst and best teachers/bosses. Or you may be able to recruit two participants in whom you have confidence. You just need to explain to them what you want them to do and be sure that they can write large and clearly on a flip chart (8-10 lines to a page) while participants are calling out to them.

Learning Activity Summary

No.	Activity	Type	Time
1	Brainstorming on Best and Worst Experiences with Bosses or Teachers	Brainstorming	20 min
2	The Principles of ZAPP!	Large Group Discussion	15 min

ACTIVITY 1: BRAINSTORMING ON BEST AND WORST EXPERIENCES WITH BOSSES OR TEACHERS – BRAINSTORMING

Time: 20 Minutes

- Begin by telling participants that you want them to do some brainstorming. The brainstorming will start as individual brainstorming. You want them to take a piece of any kind of paper. They will not have to hand the paper in to the trainer. You want them to make a list by brainstorming. You will give an example.

- Some of you might not be familiar with brainstorming. It just means quickly thinking of ideas and writing them on a list.

- If I were brainstorming about what town or city I would like to live in, I would think of ideas like these and write them on my list. There would be just short words or phrases like these (write them on a flipchart):
    - Friendly People
    - Low housing costs
    - Goods shops and Markets
    - Safety and Security
    - Good transport to other places
- That is an example of how I would brainstorm on that topic. Now I want you to brainstorm individually on a different topic.
- I want you to brainstorm a list about the worst boss or supervisor or the worst school master that you ever had. You need to write short words or phrases to explain what made him or her the worst boss or supervisor or school master that you ever had. Write down the short words such as I did. Just do not mention any person's name. I'll give you five minutes for your brainstorming.
- You can begin now. Use any piece of paper you like. Just write down the words that made the person bad. Remember, you will not hand in your list.
- The trainer then waits a few minutes so that people can write. It is a good idea to circulate quietly to see that people are writing. Occasionally, the trainer may make humorous remarks such as "Oh, I see one person who must have had a terrible school master. He has written 8 items already in his brainstorm."
- After most participants have had time to write 5-6 points in their brainstorm, announce that now you would like them to give you some of the things that they wrote down, always a single word or a short phrase. And now you ask your fellow trainer (or a participant if you have prepared one) to come up and write these points on the flip chart.

- Be sure the person writing on the flipchart writes large and clearly. The flip chart writer may need help from the trainer if a participant gives long comments that need to be summed up in one word or short phrase to write on the flip chart. Try to get at least one full flipchart page, and go on to a second page if the participants come up with enough points. You can tape one flip chart page below the other on the flipchart stand so that everybody can see both at the same time. If a point or a very similar point is repeated, tell the flipchart writer to just put a tick mark (✓) after the item instead of repeating it. There could be two or three tick marks after the same item.

- After you have 12-18 points or whenever the group slows down, ask the flipchart writer to read out the point in a loud voice. Let him or her do the reading.

- After the reading, you can remark that just hearing those words makes you sad and fearful. You feel negative. You don't want to work. You don't want to do anything. You are just discouraged.

- But tell them now you want them to do something else. You want them to brainstorm again. This time, you want them to think of the best boss, supervisor, schoolmaster, or teacher they ever had. You want them to brainstorm a new list. Ask them to begin.

- After a few minutes, ask a second trainer or participant to do the flipchart for the positive points. This time, it may go a little faster. When you have about the same number of points as before, ask the flipchart writer to read the list out loud.

- This time you can remark how the list makes you feel positive. You feel energy from it. You feel motivated. You are ready to work.

- Thank the flipchart writers, and explain to the group that what they have just done is show the difference between ZAPP! and SAPP! They understand the difference even if they don't know the names. One list is ZAPP! and one list is SAPP!

- A famous author, William Bhyam, become very wealthy by writing a book on this topic. He called it <u>ZAPP! The Lightening of Empowerment.</u> It became one of the best-selling management books of all time and was translated into many languages.

- The first list with the negative points is SAPP!

  SAPP! takes energy from people and makes them less productive.

- The second list with the positive points is ZAPP!

  ZAPP! is when you give people energy. They are motivated. They are productive and like what they do.

- Write up the two words ZAPP! and SAPP! in large letters on a flipchart. Mention that it is hard to hear the difference between the two words, but there is a big difference when you <u>do</u> them. ZAPP! with the Z sound is like lightening. SAPP! with the S sound is like bleeding. If you have words that are good substitutes in a local language, write these two words to translate ZAPP and SAPP.

ACTIVITY 2: THE PRINCIPLES OF ZAPP!

Time: 15 Minutes

This difference is easier to understand if you look at this flipchart. If you pretend that you are a cook, this is a recipe you would use for ZAPP! Or it really just starts a recipe. Everybody adds some of their own ingredients. The trainer should display the flipchart.

THE START OF A RECIPE FOR ZAPP!

- Mention the good things people are doing and their strong points
- Listen a lot. Let them tell you what is happening.
- Show respect to a colleague. Don't treat the person like an inferior.
- Tell them good news about other parts of the program or other places.
- Always be honest. Do not say that something is good if it is not.
- Listen, then give people reasonable power and authority to solve problems.
- Don't take away their responsibility.
- Let them tell you what their plans for improvement are.
- What would you add to the recipe? ___________________________________

  ____

- Give the participants a few minutes to look over the recipe. Using interactive techniques, invite their questions, and as needed ask questions like those on the list below, but let their questions and comments take priority. It is unlikely you will have time for all their comments and all these questions.
    - How does this apply if you are a trainer working with participants? [Almost all]
    - Which of the two brainstorming charts is most like this recipe? [the ZAPP! list]
    - Are there things in the recipe that are not on the ZAPP list?
    - Can you give an example of any of the points on the ZAPP list or in the recipe?
    - Do you need examples of any of the points?
    - Are any of the parts of the recipe easy or almost automatic in the culture of our country? Can any of them be difficult in our country?
    - Can you tell how any of these points apply to being a trainer?

MODULE 7: QUALITY/EFFECTIVE FEEDBACK FOR PRACTICE PRESENTATIONS

Time: 15 Minutes

SESSION OBJECTIVES

At the end of the session participants will be able to:

- List the principles of good feedback
- Identify priority topics on which to give feedback
- Give and receive effective feedback in practice presentations

MATERIALS REQUIRED

- Flip chart and markers

FLIP CHART

- Criteria for Quality Feedback.

LEARNING ACTIVITIES SUMMARY

No.	Title	Type	Time
1	Giving and Receiving Feedback	Individual reading and energizer quiz	15 mins

LEARNING ACTIVITIES

ACTIVITY 1: GIVING AND RECEIVING FEEDBACK – TRUE/FALSE EXERCISE

Time: 15 Minutes

Tell participants that we are not going to look at giving and receiving feedback. This will be important, not only for the practice presentations that we will do, but they can apply these principles in the work situation when they are supervising or when they leading a training later.

Ask participants to open their Modules Guidebook to the document titled: **Giving and Receiving Quality Feedback.**

After a few minutes, ask if there are any questions. Process them interactively. If needed, use examples to illustrate the feedback principles, but only if the participants do not come up with good examples themselves and the trainer believes there are points that are not clear.

Next tell participants that you will give them a true or false quiz. It is based on what they just read on Giving and Receiving Feedback. This will be a stand up or sit down true or false quiz. Don't be serious with it. Make it fun. Make it partly an energizer. Use words in a local language for True and False if it makes it more fun. Write the words in whatever language on a flip chart: TRUE FALSE

Tell them that you want them to stand up if the answer to a question is true, and to sit down if the answer is false. Nobody may kneel or partly stand. They must stand up or sit down. Ask everyone to rise to begin the exercise. And then ask these questions, repeating them slowly if necessary. (Be sure to notice where there is disagreement and some people stand and others sit.)

1. Quality Feedback is given as soon as possible after the Practice Presentation.
2. In Quality Feedback, you can tell the person anything at all that you want to mention.
3. Quality Feedback covers important things and leaves out unimportant things.
4. Quality Feedback is general and vague.
5. Quality Feedback always gives points that a person can actually use. It is something a person can do.
6. In Quality Feedback, you need to give concrete examples of what you mean.
7. Quality Feedback includes any kind of comment a person wants to make.

Now go back to the question where there was the most disagreement. Ask about the disagreement, and process the responses interactively.

Trainer's Answer Key

Here is the Trainer's Answer Key. Do not give out the answers after you ask each question. Wait until you have gone through all the questions and processed them as described above. Then use the Answer Key only if you need to. 1. True, 2. False, 3. True, 4, False, 5, True, 6. True, and 7 False. Number 7 is false because quality feedback covers only priority topics.

Remind participants that they will soon be giving and getting feedback on the Practice Presentations that they give. They must use these principles in the feedback.

Ask them to please remember: The person who gave the practice presentation begins with a self-critique.

Colleagues are relied upon to observe attentively and give their comments after the self-critique.

Remind participants that all these principles don't apply to the practice presentations but most do. They should take advantage of the presentations to learn how to apply these.

Tell participants that a simple summary of these points is presented in the following page in their **Module Guides** titled **Criteria for Quality Feedback.**

GIVING FEEDBACK AND RECEIVING QUALITY FEEDBACK

Giving and receiving feedback is a vital part of clinical mentoring. The feedback process is one of the best ways to improve performance and reinforce good behavior. For adult learners who like to control their learning process, the process of giving and receiving feedback is an excellent way to process new information and activities.

Giving and receiving feedback can be a sensitive process, however. To maximize the effectiveness of the feedback, it is important to follow these guidelines.

Giving Feedback

- **Pay attention to timing and location**. It is best to offer feedback immediately following the incident in question. Do not save feedback and deliver large quantities at one time, as this will overwhelm the receiver. However, pay attention to the surroundings when giving feedback. Choose a location that is quiet and private, away from patients or supervisors. If in doubt, check to see if the person is ready to receive feedback. Assuring that the mentee is not embarrassed or distracted will improve their response.

- **Describe rather than judge.** When you offer feedback, describe objectively what happened. Avoid making judgments or prescribing behavior. Focus on the behavior and not the person. Using an objective description in your feedback allows the listener to see what you are referring to in a non-threatening manner, and will help them discuss the problem with you.

- **Make clear and unambiguous statements.** Keep your sentences short and do not equivocate. Avoid applying labels, such as “incompetent” or “irresponsible.” Do not exaggerate, using statements such as “you always” or “you never.” Rather, give specific examples or numbers. Your feedback will be more effective if the person understands your point, and does not feel attacked. In many cases, feedback given is punitive. Clinical mentoring provides an opportunity to model feedback that is constructive and supportive.

- **Describe the impact of their actions.** Explain what will happen as a result of this behavior. Showing the far-reaching effects of the behavior will help the listener understand why it is important to change. However, be careful to avoid blaming the person.

- **Focus on modifiable behaviors.** Feedback is not appropriate if the receiver has little or no control over the problem, for example providing a thorough physical exam when a provider is seeing 150 patients in a day. In such situations it is better to problem-solve with the mentee and identify realistic goals with mentee.

- **Involve the individual.** Allow the individual to work through the issue with you. Rather than presenting the problem and then offering all the answers, involve the person in a discussion. Allow them to explain their behavior and highlight their difficulties. Listen actively and paraphrase their key points. Ask the person to offer ideas about how to fix the problem. Allowing the individual to create solutions will increase the probability of their taking action.

- **Summarize the conversation, and then follow up.** Ensure that you are both clear on what the problem was, and how the problem will be fixed. Offer support and encourage the individual. Finally, follow up over time and praise any changes that have occurred.

Receiving Feedback

- **Listen carefully.** Do not interrupt the speaker. Make eye contact, and when they have finished ask questions to clarify their meaning.
- **Don't be defensive.** As you listen to what they are saying, try to see their point of view, or understand how you can use this feedback effectively. If you disagree with a point, ask for more details or examples.
- **Summarize what you have just heard.** Put their feedback into your own words and ask them if you have understood correctly.
- **Feel free to discuss the feedback.** Without being defensive, discuss the input. Explain your reaction, problems you might have with changing, and the impact you see changing might have.
- **Build a plan of action.** It may be helpful to involve the person giving you feedback in making a plan to change. If you do not feel comfortable with all of the feedback, you may wish to take some time to evaluate what you feel is important to change, and then return to discuss a plan of action with the person giving the feedback. Remember that even if you don't agree with everything, some portion of the feedback may be accurate.

GIVING FEEDBACK SUMMARY

- ✓ Specific
- ✓ Usable
- ✓ Balanced
- ✓ Prioritized
- ✓ Contextual
- ✓ Timely
- ✓ Cross-Culturally Sensitive

Criteria for Quality Feedback Giving

1. Pay attention to timing and location.
2. Describe rather than judge.
3. Make clear and unambiguous statements.
4. Describe the impact of their actions
5. Focus on modifiable behaviors.
6. Involve the individual.
7. Summarize the conversation, then follow up.
8. What Else? __________

Criteria for Quality Feedback Receiving

1. Listen carefully.
2. Don't be defensive.
3. Summarize what you have just heard.
4. Feel free to discuss the feedback.
5. Build a plan of action.
6. What Else? __________

MODULE 8: NORMS FOR TRAINER TEAMS

Time: 20 - 40 Minutes

SESSION OBJECTIVES

By the end of the module participants will be able to:

- List the Norms for Trainer Teams.
- Use the norms as they work in trainer teams.

MATERIALS REQUIRED

- Flip chart and markers Handouts
- The participants will need their Module Guides.

PREPARED FLIPCHARTS

Handout 21, Norms for Trainers, as seen in the box below in Activity 1.

TRAINER PREPARATION

In addition to the regular preparation for a Module, the three trainers on the TOT team need to be ready in Activity 2 to answer questions and, time permitting, give a few of their experiences.

LEARNING ACTIVITIES SUMMARY

No.	Activity	Type	Time
1	Study of Norms for Trainer Teams	Small Groups by Region	20 min
2	Discussion of Norms for Trainer Teams (optional but useful for first time trainers)	Q&A in Large Group	20 min

ACTIVITY 1: STUDY OF NORMS FOR TRAINERS – SMALL GROUPS BY REGION

Time: 20 Minutes

The trainer introduces the Module by reminding the participants that they agreed on group norms on the first day of the course so that the group could work better. The trainer should point to the list of group norms posted on the flip chart on the wall to refresh the memory of the participants.

- In a similar way, a trainer team also needs norms so that the trainers can present a course effectively. The trainer team norms are different and there are more of them. Training is a lot of work, but it should also be enjoyable. Training should be fun! Following the trainer team norms will help make the training easier and more fun for the trainers and fun for the participants, too.

- The trainer team norms are used even before the course starts. The trainers need to meet for a day to make their plans final. Most of the other Norms are about planning and collaboration.

- All of this will become clearer when you study the norms in your discussion groups. In your discussion groups you should read over the document in your **Participant Modules - Norms for Trainers**. After some discussion, your group should see if there are any clarifications, questions, examples of norms seen in the TOT, or comments about the Norms for Trainers. Each group should be ready to share these points with the larger group.

- Here is what your group should look for as you discuss the norms. The trainer displays this prepared flip chart.

> **Norms for Trainers**
>
> - What I most agree with
> - Questions I have
> - Examples seen in the TOT so far
> - My Comments

- The trainer explains that the participants will discuss the norms with the people they will be on training teams with.

- The trainer divides the participants into appropriate groups, telling them that they should take their Module Guide with them.

- Tell participants to open their Module Guidebooks to Norms for Trainers. They should take a few minutes to read the page and mark any clarification or question they have. If the can give an example of a norm seen in the TOT so far, that will be useful. And comments for discussion later in the large group will always be welcome.

- Give the participants time to read the norms, but also circulate and remind them that they need to discuss the norms in their group. The discussion is as important as the reading. Adults learn from one another.

- Tell them when they have only a few minutes left, then call time.

ACTIVITY 2: DISCUSSION OF NORMS WITH TRAINERS – Q&A IN LARGE GROUP

Time: 20 Minutes

If there is time this activity can be very useful for those who have never trained before

- All the TOT trainers need to present Activity 2. The trainers need to share the duty of responding to the clarifications, questions, examples, and comments of the participants coming out of their small discussion groups.

- One of the trainers calls the participants back into the large group. He or she points to the flip chart and explains that all the TOT trainers will be ready to offer clarifications, answer questions, hear about the examples of the norms seen so far in the TOT, and respond to the comments on the norms from the participants. The TOT trainers will also be ready to explain their experience with the norms as they have used them in training over the years.

- The trainer stresses that this is a large group discussion with Q&A, and it is not necessary to go one by one down the flip chart, or to do one small discussion group at a time. Anyone can raise his or her hand at any time. It is important to hear from as many people as possible.

- At this point the trainer opens the discussion and invites questions, comments, examples, etc.
  Note that if the discussion is slow to get started, the trainers can offer discussion questions such as these, but only if they are needed:

  - Trainers negotiate in dividing up the Sessions and Activities of the course according to who will present and co-present. What do you think should be the maximum length of time one trainer should present? Is it one hour? Two hours? Give your reasons why.

- Do you think it is ever permissible at a daily trainer team meeting to change the training assignments for the next day? On the planning day before the course, all the trainers agreed on who would present what. Can that ever be re-negotiated?

- Why do you think “Trainers do not discuss participants with other participants” is included in the norms?

- Do you believe it is better to have the daily trainer team meeting in the afternoon right after the day ends or early in the morning before the training starts? Give reasons why.

- As the discussion proceeds, be sure that not all the time is spent on just some of the norms. As needed, make comments such as, “Nobody has made any comments about the norm on ……… yet. What do you think about this norm and how it would be applied?”

- All of the norms need to be included in the discussion.

- Conclude by reminding participants that they will be using the norms for Trainer Teams daily through the rest of this course and as they go to train their own first group of participants in a few days.

TRAINING PREPARATION CHECKLIST

- Schedule dates of training
- Secure training location
- Assemble materials for:

  Training

  - Markers
  - Tape
  - Scissors

  For Each Participant

  - The User's Guide
  - (WEB BASED vLMIS) Participant Guide (PG)
  - Name tag
  - Notepad
  - Folder
  - Pen and pencil
  - Calculator
  - Certificates

- Arrange transport to training location (specific to country policy)
- Arrange for administration of finances for training and participants (specific to country policy)
- Work with co-trainer to divide the work and practice sessions

ANNEXES

The following sessions and documents can be used if they are helpful.

Trainers will benefit by reviewing the materials within this section.

ANNEX – I: TRAINING TECHNIQUES

Time: 75 MINUTES

SESSION OBJECTIVES

By the end of the session participants will be able to:

- List a variety of types of learning activities
- Differentiate which activities are used best to improve knowledge, skills and attitudes
- Select the appropriate learning activities to meet learning objectives
- Give and receive effective feedback in practice presentations

MATERIALS REQUIRED

- Flip chart, markers, tape
- Cards for Activity 3
- Two envelopes

HANDOUTS

No Handouts – Materials in Modules Guide

TRAINER PREPARATION

Cut up cards for Activity 2

LEARNING ACTIVITIES SUMMARY

Title	Type	Time
1. Session Introduction	Lecturette	15
2. Learning Activities: Which Activities Work Best and When	Matching Card Exercise Lecturette	25
3. Selecting Learning Activities	Small Group Exercise	25
4. Summary	Discussion	10

LEARNING ACTIVITIES

ACTIVITY 1: SESSION INTRODUCTION – LECTURETTE

Time: 15 Minutes

Tell participants that during this session they will start to look at different training techniques (learning activities) and how to select them.

Tell them that in order to select learning activities they should examine each learning objective and decide which **learning activities** are the most appropriate to facilitate achieving that objective.

Ask why we are putting so much emphasis on the learning activities.

Answers should include:

- The activity allows learners to work **with new information or situations**.
- The activities require learners **to use the skills and knowledge** they are learning in the environment where they work, or in a very similar environment.
- The activity should give learners have many **opportunities to practice** solving problems.
- Learners receive **specific feedback** after performing a skill performed in the activity and have an opportunity to immediately correct any mistakes.
- Learners are encouraged to **take responsibility** by monitoring and assessing their own learning.

Brainstorm the criteria to select or how you would select which learning activities to include in your training session. Select learning activities, based on:

The Learning Objective

- The **learner characteristics** (e.g., educational background, job responsibilities, access to technology)
- **Available resources** for purchasing, producing or disseminating the materials
- Any **requirements for the learning** (e.g., if particular standards, guidelines or reference information must be used or adapted).

ACTIVITY 2: TRAINING ACTIVITIES: WHICH ACTIVITIES WORK BEST AND WHEN – MATCHING CARDS - EXERCISE AND LECTURETTE

Time: 25 Minutes

With the learning activity cards cut up and put in two envelopes (one for the activity and one for the definition), give each participant at least one activity card and then have them each select a definition card. Have them read through their activities and the definition. Then tell them that they have 10 minutes to find their two partners- the partner who has the activity for their definition card and the partner who has the activity card for their definition.

Once all the participants have found their matches, have everyone hold on to at least one of their definitions and topic pairs. In the end, each person should have one matching activity and definition card. Have each participant read out their activity and its definition. Follow-up by asking if we have completed that activity in this workshop so far and ask them to tell you when.   After everyone has read their activity, ask participants to think of any other of learning activities that they might have taken part in during other trainings.

Tell participants that objectives address knowledge, attitude or skills. Explain that certain learning activities are better suited to teaching knowledge, some for attitudes, and some for skills. Briefly give a few examples of which activities are best suited to teach knowledge, which to teach/change/improve attitude, and which to teach/improve skills, such as:

- Brainstorm (attitude/knowledge)
- ice-breaker (attitude/knowledge)
- Lecturette (knowledge)
- group discussion (attitude/knowledge)
- individual, pairs and group work (knowledge and skill)
- exercises (skill/knowledge)

Ask participants to suggest for what kind of objective their activities on their cards are best suited.

Ask Participants to open their Module Guides to Handout 8 **page 24 Training Techniques** and note that this is a reference document on training techniques that they can use in the next exercise but also in the future as they develop their own training materials.

ACTIVITY 3: SELECTING LEARNING ACTIVITIES – SMALL GROUP EXERCISE

Time: 25 Minutes

Ask participants to work in pairs. Using the Trainer Guide for WEB BASED vLMIS the trainer asks to participants to select one technique from the handout and find where it is used in the Trainers Guide and why. They will have approximately 10 minutes to complete this activity.

After 10 minutes, ask for a pair to volunteer to start. Each pair should present the session's objectives and then the activities. Each pair has approximately 2 minutes to present.

ACTIVITY 4: SUMMARY – DISCUSSION

Time: 10 Minutes

Ask participants if they see themselves using most of these approaches. Would they be able to use most of the activities listed in Handout 1? Ask them to say which of the techniques that are most used and why.

Conclude the session by telling participants that many people ask, "What is the best technique to use for finding out what people already know and do?" Or, "What is the best technique to introduce new information?" Tell them that they can use almost any technique at any stage in the Experiential Learning Cycle. They just need to know their participants, know their resources and have clear learning objectives. They should select the most appropriate approach based on whether it allows for learning and it allows for enough practice and feedback to learn.

Allow time for questions

ANNEX – II: CARDS FOR LEARNING ACTIVITIES MATCHING CARD EXERCISE

Ice Breaker	Helps participants feel at ease with each other and comfortable in the new learning environment.
Setting Group Norms	Establishes how the group will behave during the training activity.
Expectations Exercise	Establishes a clear understanding of what will be accomplished in the workshop.
Presentation	A short talk by a resource specialist to convey information, theories, or principles. Could be a lecture but can also include participant involvement.
Interactive Lecturette	Provides participants with specific information and/or to set the stage for an experiential activity. A short form of a lecture but incorporates more participant involvement.
Demonstration	A presentation of a method for how to do something.
Case Study	A written description of a situation that is used for analysis and discussion. Usually a written summary including incidents, actions, characters and discussion questions.
Role Play	Two or more individuals enact parts of a scenario related to a training topic.

Brainstorm	Participants are asked to think of as many ideas, definitions, solutions, etc as they can to topic given in a limited amount of time.
Games/Simulations/ Structured Experiences	Allow participants to take part in learning activities that approximate a real life problem or situation.
Small Groups (dyads, triads, & more)	Include 2 to 7 participants and help participants share ideas and to bring individuals together for discussion or problem solving.
Fishbowl	Provides participants with an active observation and analysis exercise that allows them to witness and critique a staged situation.
Field trips	Allow participants to experience firsthand the topic of study.
Interviews	Involve participants in soliciting information about a particular topic and/or from a particular source.
Panels	Uses outside experts to present or demonstrate new materials or ideas.
Critical Incidents	Similar to case studies, it presents a short paragraph describing a situation that requires an immediate response.
Peer Training	Allows participants with expertise in a certain field to help in the training process and add to both content areas covered and styles being modelled.

Envelope Exercise	Participants select strips containing different steps in a process and learn about their sequence by putting them in order.

ANNEX – III: TRAINING TECHNIQUES

In order to select the learning technique which responds to the diverse learning styles of your participants and one which is appropriate for the material you will present in your training sessions, you need a variety of training techniques at your disposal.

While by no means an exhaustive list, the training techniques discussed below are the ones most commonly used by trainers. As you develop your training design, remember that your success in using these techniques will depend on your ability to adapt them to meet the needs of your participants and the cultural context in which you train.

This document describes the following 18 training techniques:

1. Ice Breaker
2. Setting Group Norms
3. Expectations Exercise
4. Presentation
5. Interactive Lecturette
6. Demonstration
7. Case Study
8. Role Play
9. Brainstorm
10. Games/Simulations/Structured Experiences
11. Small Groups (dyads, triads, & more)
12. Fishbowl
13. Field trips
14. Interviews
15. Panels
16. Critical Incidents
17. Peer Training
18. Envelope Exercise

ICE BREAKER

DESCRIPTION

The purpose of an icebreaker is to help participants feel at ease with each other and comfortable in the new learning environment where you are training. It also establishes group rapport. As its name implies, it warms the learning environment to the point that the "ICE" keeping participants from interacting with each other is broken up.

USES

An icebreaker generally involves all participants in an active role. It sets the tone for the training by creating a non-competitive environment, so that participants can interact with each other without feeling threatened. Ice breakers should be fun and attempt to create a bond between trainer and participants that can be strengthened during the rest of the training program. An example ice breaker:

a. Randomly pair-off participants.
b. Have participants work in pairs and find out as much about each other in five minutes as possible.
c. Each participant then introduces his/her partner to the rest of the group.

Since ice breakers can often incorporate games, unorthodox activities or close physical contact between participants, it is important to keep in mind (as with all of these techniques) what is appropriate to the culture and context in which you will be training.

SETTING GROUP NORMS – "COURTESY LIST"

Description

Group norms establish how the group will behave during the training activity.

Uses

Allow the participants to set the norms through a brainstorming activity and synthesize the results making sure there is general agreement on the norms.

Examples of group norms include:

- No smoking in the training room
- Everyone will be encouraged to participate, but no one will be forced
- Sessions will start and end on time
- No one will interrupt anyone else speaking

EXPECTATIONS EXERCISE

Description

It is important early in the workshop to check the expectations of the participants and to compare them to what has been planned for the workshop. The participants should have a clear idea as to how and when their expectations will be met in the workshop. It should also be made clear if there are some expectations which will not be met in the workshop, but could be met in other workshops or learning situations. This open communication establishes a sense of respect between participants and facilitators, and allows participant input into the training.

Uses

Ideally participant expectations are discovered in the needs assessment, before the training is designed. If this is not the case, make your training design as flexible as possible to accommodate as many of the participants expectations as possible during the workshop.

Process

An expectations exercise may be conducted following this example:

1. Trainer informs the participants that it is important to know the group's expectations for the workshop and asks them to pair up to write down what they hope to get out of the workshop.
2. Trainer then records the answers on newsprint.
3. Most common expectations are highlighted.
4. Trainer goes over the goals and objectives and then the schedule planned for the workshop and notes similarities.
5. For those expectations that are not going to be met by the planned schedule, the trainer discusses with the group how they might or might not be able to achieve them. A consensus of understanding of what is going to be achieved is necessary before you go any further in the workshop.

PRESENTATION

Description

A presentation is a short talk by a resource specialist to convey information, theories or principles. Forms of presentations can range from straight lecture to some involvement of the learner through questions and discussion to more focused participant assignments. Presentations depend more on the trainer/presenter for content than does any other training technique.

Uses

- To introduce participants to a new subject
- To provide an overview or synthesis
- To convey facts, statistics
- To manage a large group
- Advantages
- Covers a lot of material in a short time.
- May be considered “the” appropriate learning approach in some cultures.
- Useful for large groups.
- Can be supplemented by follow–up tasks to address other learning styles.
- Ensures a minimum level of knowledge before engaging participants in more interactive training activities.
- The presenter has more control than in other techniques; may be appropriate/ necessary in certain situations.
- Can be varied by participant assignments (see below).

- Things to be Aware of Before You Decide to Use a Lecture
- A presentation is common in more formal situations, in certain cultures.
- Emphasizes one–way communication; comprehension needs to be verified.
- Is not experiential in approach; learner's role is passive.
- Lecturer needs skills to be an effective presenter; selection of lecturer is important.
- Inappropriate for changing behavior or for learning skills
- Learner retention may be limited unless presentation is followed up with other activities or study materials.
- Attention span of learners is often overestimated; 20 minutes of straight lecture is about the maximum for most people.

Process

A typical sequence:

1. Introduce the topic—tell the learners what you're going to tell them.
2. Tell them what you want to tell them—present the material, preferably using visual aids.
3. Summarize the key points you've made—tell the learners what you've told them.
4. Invite the learners to ask questions.

1. Interactive Lecturette

Description

The purpose of a lecturette is to provide participants with specific information and/or to set the stage for an experiential activity. Generally they should be used as a training activity with participants who have some previous knowledge of the topic. Lecturettes are short forms of a lecture which are used to highlight key points of content. They differ from traditional lectures in that they often incorporate participant interaction and, at times, give the impression of a discussion. Lecturettes are useful as introductions to topics and "lead-ins" to experiential activities. They seldom last longer than 15 minutes.

Uses

As an activity, lecturettes are useful to introduce new theories. They are often used when the trainer is trying to meet a knowledge-oriented objective.

Process

The steps in delivering an effective lecturette are:

1. Trainer prepares an outline of the lecturette and develops supporting instructional materials.

2. Trainer introduces the lecturette by asking participants related questions that set the stage for new information and assess participants' current understanding of the topic.

3. Key information is presented to participants.

4. Trainer solicits information and/or questions from participants.

5. Trainer allows discussion of unclear points.

6. Trainer summarizes, concludes and proceeds to next part of the session.

Before using interactive lecturette as a training activity, the trainer should consider the following points:

a. How does the lecturette fit with overall session objective?

b. What visual aids will help make the lecturette more effective?

c. What is the participants' level of knowledge about the topic?

d. When during the day is it best to use lecturette as a training activity?

During the lecturette, the trainer should make sure to summarize frequently, use concrete examples, elicit input and make smooth transitions between different areas of the content and to check frequently for participant understanding. Humor can be easily and effectively used in lecturettes and should be.

DEMONSTRATION

Description

A demonstration is a presentation of a method for doing something.

Uses

- To teach a specific skill or technique
- To model a step–by–step approach

Advantages

- Easy to focus learner's attention
- Shows practical applications of a method
- Involves learners when they try the method themselves

Things to be Aware of Before You Decide to Use a Demonstration

- Requires planning and practice ahead of time.
- Complicated or long processes needed to be broken down into parts.
- Room set–up important so everyone can see clearly.
- Demonstrator needs to have enough materials for everyone to try the method.
- Requires giving feedback to learners when they try themselves.
- Some types of demonstrations cannot be done or practiced by large groups.

Process

1. General sequence:
2. Introduce the demonstration—what is the purpose?
3. Show and describe the equipment you're going to use, as appropriate
4. Demonstrate, talking through what you are doing, if possible
5. Demonstrate again, explaining each step
6. Invite the learners to ask questions
7. Have the learners practice themselves
8. Discuss what was easy/ difficult for them—why? How could they do it better next time?
9. If possible, let learners practice a second time.
10. Summarize.

Technique may be Varied

If demonstration was on a topic that allows, participants may turn to a neighbor to practice. For example, if they have watched a particular type of interview, they might practice the type of questions with a neighbor. Participants may form triads: one practicing, one coaching, and one criticizing. Rotate roles three times.

CASE STUDY

Description

A case study is a written description of a situation that is used for analysis and discussion. Longer than a critical incident, it usually has several incidents or actions, several characters, and details about the context of the situation. The components of a case study are usually the case itself and discussion questions. However, a case study may include separate descriptions of the perspectives of different characters. Cases may also have related documents to use in the analysis, such as organizational procedures and policies, correspondence, reports, laws, or other readings.

Uses

- As an introduction to a topic by raising questions related to a situation.
- To discuss common problems in a typical situation.
- To provide a safe opportunity to develop problem–solving skills before personally confronting situations that might be confusing, frightening, or overwhelming.
- To promote group discussion and skills in group problem–solving and consensus–building.
- To test knowledge gained by applying it to resolving issues in case.

Advantages

- Learner can relate to the situation
- Involves an element of mystery
- Learners are involved but in a low–risk setting
- Can create case studies from training participants' actual experiences
- Things to be Aware of Before You Decide to Use a Case Study
- The case must be closely related to the learners' experience.
- Problems are often complex and multi–faceted; may need to develop a sequential case study where one part is discussed before more information is introduced.
- There usually is not one right solution; solutions and their ramifications need to be discussed.
- Requires a lot of planning time if you need to write the case yourself.
- Discussion questions need to be carefully designed and sequenced.
- May frustrate learners who see trainer as expert who will not provide "right" answer.

Process

General

1. Introduce the case
2. Give learners time to familiarize themselves with the case
3. Present questions for discussion or the problem to be solved
4. Give learners time to solve the problem/s
5. Have some learners present their solutions/answers
6. Discuss all possible solutions/answers
7. Ask the learners what they have learned from the exercise
8. Ask them how the case might be relevant to their own environments
9. Summarize

As Motivation

- Ask participants to read case and list all information they need to learn before they can work on case.
- Questions are grouped and addressed through training activities.

As Evaluation

- Develop a case study with questions that apply knowledge gained in the training.
- Participants, individually or in groups, analyze the case and make decisions which they defend.

ROLE PLAY

Description

In a role play, two or more individuals enact parts in a scenario related to a training topic. The role play is part of a larger session; most commonly it is the practice portion. Role play sessions are based on a well–defined goal. Participants receive any needed background earlier in the session, such as type of questions if they are to practice interviewing skills. Role plays should be clear and concise and open–ended.

Uses

- Provides participants an opportunity to build skills.
- Enables people to see the consequences of their actions on others.
- Provides an opportunity for learners to see how others might feel/behave in a given situation through role reversal.
- Provides a safe environment in which participants can explore problems they may feel uncomfortable about discussing in real life.
- Enables learners to explore alternative approaches to dealing with situations.
- Helps to change people's attitudes.

Advantages

- Simulates the real world.
- Engages the group's attention; observers as well as players learn.
- Can have all participants practice in small groups.
- Things to be Aware of Before You Decide to Use a Role Play
- Role plays should not be confused with skits, dramatizations.
- Role plays are often miss–used and participants may have had prior unpleasant experiences where they felt "tricked".
- Role plays must be carefully explained and the purpose made clear.
- Trainer needs skills in stopping and debriefing role plays.

Process

1. General steps
2. Explain goal.
3. Review theory, or describe the skill or approach to be practiced.
4. Explain the setting and what roles will be played.
5. Distribute role sheets to appropriate people including observers, and give time for everyone to think through the situation, applying what they have already learned.
6. Review what observers are to do. Tasks should relate to goal of session and role play itself.
7. Prepare the actors so they understand their roles and the situation; do this to side of room, not in front.
8. Set the scene, including physically arranging chairs, etc.
9. Start the role play.
10. Stop the role play at appropriate time, usually five to eight minutes after starting. Ask role players to stay in their positions during debriefing.
11. Debrief role play by asking observers key questions related to purpose of role play. Focus on behaviors and observations, not interpretations.
12. Ask role players key questions related to goals and skills they were working on.
13. De–role players. Explicitly say they are no longer X and Y, and have them return to regular seats.
14. Discuss different approaches to what happened. If time permits, may run role play again, trying a different approach.
15. Ask the learners what they have learned and draw conclusions.
16. Ask the learners how the situation relates to their own lives

Variations

When trying to build empathy or change attitudes, role players may be asked to reverse roles part way through the situation, or replay the situation in different roles. Discussion after the role play needs to address what they learned from this reversal.

Have everyone practice by forming triads. Each person plays each role and observer as role play is run three times.

BRAINSTORMING

Description

Participants are asked to think of as many ideas, definitions, solutions, etc. as they can to a topic given in a limited amount of time. The trainer lists the ideas on a flip chart for everyone to see, without making changes to the items called out. No discussion is allowed and all items are listed, even if opposites are suggested. The number of items are the goal, and piggy-backing on someone else's idea is encouraged. The trainer may give prompts, such as

"Have you thought about _____", to encourage additional ideas.

Once the time limit (usually 5 to 10 minutes) has been reached and/or participants run out of ideas, the trainer stops the generative activity. Participants are asked to look at the list and ask for clarification of ideas, if need be.

Then a second step is usually introduced. (Only occasionally, such as a summary or an expression of appreciation – The Joys of Coming Home—are lists simply created and left.) The second step is the "Plus" to the Brainstorming. Brainstorming should have a purpose: to get participant's definitions of a key concept, concerns, solutions to a common problem, and so on. The Plus part is working with the brainstormed list in some way: categorize items for a speaker to address or to be assigned to committees to work on, sequence items for the agenda of the meeting/training, types of solutions to be further researched, or to reach consensus on the five most important topics.

Uses

- Opening a new topic:
- find common ground (level of knowledge)
- learn perceptions/slant of participants' thinking
- focus on the topic at hand
- Generate many potential solutions
- Look at something more creatively
- Warm up, energize a group

Advantages

- Find a common ground (level of knowledge)
- Learn perceptions/slant of participants' thinking
- Draw on participant's experience and knowledge
- Get participants involved in a non-threatening way
- Help open minds to new thinking, ideas
- Change pace of training
- Change tenor of training – for example, in a climate where the training has been on a difficult or sad topic (loss/grief, adjustment/reentry, etc), brainstorm some joys, bright spots.

Things to be Aware of Before You Decide to Use Brainstorming

- The participants need to know something about the topic.
- Participants need to feel safe giving their suggestions.
- Trainer needs to be able to control most aggressive participants, such as by taking one idea from each person until people start to "pass" because they are out of ideas.
- Trainer needs to be able to capture ideas quickly but legibly; can work with a co-trainer, but then need to agree on how they will work together.
- Trainer needs to really value input and not have his/her own definition, solution in mind.
- Must be a topic on which many ideas are possible.

Process

1. Arrange room so everyone can see a flipchart, white- or blackboard.
2. Introduce topic.
3. Introduce method of brainstorm, giving "ground rules"
4. Purpose is to generate lots of ideas.
5. No discussion of suggestions; all will be written.
6. Everyone can call out ideas (unless trainer wants to start with everyone contributing at least one idea first).
7. Listen to others and piggy-back on their ideas or use their ideas to spark your own.
8. Suggest an opposite if don't agree with point given.
9. There is a time limit of (5) minutes.

10. Conduct brainstorm, being careful to

    a. Capture all ideas…can go back and say missed someone, what did s/he suggest?
    b. Write exactly what was suggested, or an abbreviation of it; do not rephrase (then the suggestion is yours, not theirs)
    c. If numbering the items, number ahead in a lull, to show participants you expect more items.
    d. Encourage, by saying there is lots of space left, have more sheets of paper.
    e. As appropriate, give prompts that will get thinking moving in different directions….”What about ___?”
    f. Refocus group if they get off of topic.
    g. Stop brainstorm and thank participants for all their ideas.
    h. Ask everyone to look over the list. If they don’t understand an item, ask. The person who gave it can explain.

11. Introduce the next step. As appropriate to the purpose and topic:

12. Facilitate a discussion of the items.

13. Assign groups to tasks, such as

    i. Group A will determine which items can be done in the short term, Group B will list medium term, and Group C will list long term solutions.
    j. Women and men form separate groups and discuss the topics you each consider the most pressing.
    k. Ask pairs to select what they think are the 5 best ideas and prioritize them by easiest to accomplish.

14. Report out next steps, as appropriate.

GAMES/SIMULATIONS/STRUCTURED EXPERIENCES

Description

Games, simulations and structured experiences allow participants to take part in learning activities that approximate a real life problem or situation. These types of activities take a great deal of planning and require a high degree of familiarity with the subject matter. In designing these learning experiences, it is important to have clearly stated learning objectives and a design that ensures the desired learning outcomes are reached.

Uses

Generally, games or simulations ease anxieties or fatigue and are sometimes most effective at the end of a session or at the end of the day.

Process

The steps in facilitating a game/simulation/or structured experience are:

1. The trainer explains procedures involved in activity (where appropriate, trainer
2. demonstrates procedures).
3. Participants are encouraged to be spontaneous and have fun.
4. The game/simulation/structured experience is carried out.
5. The activity is analyzed and discussed. Highlight possible adaptations for use of technique by participants.

SMALL GROUPS (DYADS, TRIADS, AND MORE)

Description

Small groups of two to seven are used to help participants share ideas and to bring individuals together for discussion or problem solving. The smaller the group, the greater the chance of individual participation.

Uses

Small groups can be used for:

- Building problem-solving skills to deal with a particular issue or problem (case
- Studies, critical incidents, etc.)
- Building planning skills to deal with how to approach a particular issue or opportunity (strategy development or planning)
- Providing opportunities for practicing a new technique or skill (practice dyads, trios, quads, etc.)
- Providing opportunities for participants to react to each other's approach, giving advice, feedback, and constructive help
- Providing opportunities for participants to share experiences, both problems and solutions that might be helpful.

The trainer may ask the participants to choose partners or assign partners according to specific criteria. The trainer can use this technique for in-training participation or to establish working groups for outside training assignments. Possible tasks might be writing action plans, analyzing situations or reporting.

Process

To make small group work effective, the trainer should:

1. Be very clear in giving task instructions to small groups. Put the instructions on a visual aid, preferably the flipchart. The trainer may also want to put the instructions on a handout. Go over the instructions in front of the entire group. Ask if they have questions.

   Decide if each group should make a short presentation (report outs) or if the trainer will lead the discussion differently. Keep the presentations brief; if they are over 10 minutes, people get weary -- 5 minutes is a better time frame. Then decide if participants should put key points on the flipchart since it records the points for referral later and helps them deliver a more focused, shorter presentation.

2. Divide the total group into an appropriate number of small groups. Small groups of three to five people are desirable. Groups of over seven people begin to be unwieldy.

   The total group can self-select themselves into smaller groups, or the trainer can make the selection. Be sure each small group has a balance of different participant knowledge, experience, and personal styles. If the trainer divides the group, he/she should inform the group why and how the selections were made. This keeps participants from trying to find a hidden agenda.

3. Provide an appropriate amount of time for the small groups to accomplish the task. There should be enough time for discussion, deliberation, and decision while still encouraging them to be efficient with time.

4. The trainer should monitor the small groups unobtrusively to be sure they have understood the task, are not having problems, or have not gotten hopelessly entangled in another conversation or war story.

5. A few minutes before they are expected to have completed their work, the trainer should go around and remind groups of the time and ask if they will be ready. Encourage them to move forward.

6. The trainer should have a plan for how the small groups will share their work with the total group. There are a number of ways of doing this. The most common way to manage reporting out is simply to take turns, one group, then another, then another. Here are some simple ways to keep things moving:

   - Have people wait until the presentation has been completed before commenting
   - First ask the other group members if they have something they would like to add that their spokesperson did not say
   - Then ask the total group if they have any questions of clarity (not debating their points, but questions to increase understanding of what the small group meant)
   - Finally, ask for reactions from the total group.

   After or during the time the total group is commenting or reacting to the small group presentation, the trainer can add comments. The trainer may ask a question or make a comment, but should refrain from evaluating the presentation or the content -- unless of course you say positive things.

7. Keep things moving along. Lots of reporting out followed by lengthy commenting can get exhausting. If there are several small groups reporting out and their reports may be somewhat repetitive, it is a good idea to save comments until the end and comment on all reports.

8. After all groups have reported out, lead a summary discussion of all the ideas that have been presented. The trainer may explore similarities and differences; ask people to talk about what they think is or will be the most difficult idea to implement; ask what they heard that struck them as especially creative; or explore a disagreement more fully.

9. A good way to end the discussions is to use the generalizing and application part of the experiential learning cycle. Ask the question(s)... What conclusions are we reaching about...? What are we learning about...?

   Move to the application phase by asking... When/if this happens to you, what is one thing you will remember to do? In order to keep this from happening to you, what are three things you can do? How can you adapt what we have been discussing here today to your own situation?

FISHBOWL

Description

The purpose of a fishbowl activity is to provide participants with an active observation and analysis exercise that allows them to witness and critique a staged situation.

Uses

During a fishbowl activity, one small group is situated in the center of a larger group so that the outer group can observe and analyze the interactions of the inner group. Participants may observe a role play or an actual situation such as a discussion or a planning meeting. This allows one group of participants to evaluate a given situation from the outside by seeing it enacted in a precise manner by another group of participants. The focus is on the observation and feedback that is done by the outer group to the information supplied by the inner group. Situations might include interaction between supervisors and employees, decision making or problem solving. Again, the purpose is to practice observation of a group activity and have the opportunity to give feedback on that process.

Process

The steps in conducting a fishbowl activity are:

1. Trainer divides participants into inner and outer group.

2. Inner group openly discusses or acts out situation (developed by trainer or participants).

3. Persons in the inner group are active while the outer group listens and observes behavior. Specific observation roles may be assigned to outer group members.

4. Outer group gives feedback to inner group about what they saw.

5. Trainer facilitates analysis of behavior witnessed in inner group.

Fish Bowl Alternative

An alternative way to do the fish bowl is to have the inner group start a discussion of a topic, with a few empty seats available. Any one from the outer group is invited to join the discussion when they wish and leave when they wish, contributing while they are there. This allows generation and exploration of a large variety of ideas, and promotes debate. It is particularly good technique for problem solving and working on attitudinal objectives.

FIELD TRIPS

Description

The purpose of field trips is to allow participants to experience, firsthand, the topic of study. Field trips generally bring to life ideas that have been discussed and analyzed in class.

Uses

Field trips should be well planned and help stimulate the interest of the participants. The trainer must be aware of financial and time factors and coordinate field trips accordingly.

Process

Steps in using field trips as a training activity include:

1. Participants are briefed on field trip -- location, time and purpose of trip. Objectives for the trip are outlined.

2. Trainer may help formulate a list of questions, observations, or considerations that participants may wish to investigate.

3. Field trip is conducted -- this may include escorts with explanations by specialists.

4. After field trip, participants are debriefed. The field trip is discussed and critiqued. Objectives are discussed and a question and answer period allows for participant interaction and sharing of ideas.

INTERVIEWS

Description

Interviews involve participants in soliciting information about a particular topic and/or from a particular source.

Uses

Interviewing can be done within the training group or used as a method to involve the group in the community where training is taking place. Questions can be designed by the participants to address issues and concerns they may have and which would be valuable to the entire group. Participants are able to witness a variety of strategies used by their colleagues to gather and analyze information.

Process

To use interviews as a learning activity, the following procedures are followed:

1. Participants divide into groups.
2. The time period for the exercise is established -- either during training time or during an established time outside of training.
3. Participants design their own strategies for asking questions and gathering information.
4. A presentation strategy is discussed and decided upon for presentation of information to the entire group.
5. Information is collected.
6. The information is analyzed and organized and presentations are given.

PANELS

Description

The purpose of panels is to use outside "experts" to present or demonstrate new materials or ideas. Panel discussions often involve a facilitated debate and presentation on a given topic, followed by a question and answer period. Variations on this pattern that allow more open interaction between panel members and participants are possible and should be experimented with.

Uses

Panels of experts can enhance the learning experience of the participants and give them access to active specialists in their field. It can help participants to establish an information support network outside of the training program.

Process

To facilitate an effective panel, the following steps should be followed:

1. Objectives of having guest speakers are set.
2. Panel members are selected by trainer and/or participants.
3. Panel is invited to training session (guidelines and information are provided to panel members).
4. Participants are encouraged to ask questions or join in discussion.
5. Analysis and evaluation of panel presentation by participants is facilitated by trainer.

CRITICAL INCIDENTS

Similar to case studies, the critical incident is a short paragraph describing a situation that requires an immediate response. Participants are encouraged to respond to the incident, take a stance they would defend, and discuss the range of options with other participants. The steps for conducting a critical incident activity are the same as those for a case study.

PEER TRAINING

Peer training allows participants with expertise in a certain field to help in the training process and add to both content areas covered and styles being modeled. Peer training can help participants to network for future cooperation, collaboration and support in their work.

Uses

It takes the role of trainer away from the trainer and gives the authority and control of learning back to the participants. Though rewarding, the preparation for peer training activities can be extensive and involved and the trainer should be ready to commit a great deal of time to this activity.

Process

The steps to peer training are:

1. Trainer solicits participant assistance in training in a particular field of study, asks for areas of expertise from participants, or assigns participants topics to be researched, prepared and presented.

2. Participants who wish to (or are assigned to) help with the training work with the trainer to establish a session training design.

3. Other participants are encouraged to ask questions and participate in discussions about the topic area to be presented.

ENVELOPE EXERCISE

Envelope exercises are particularly good to use when participants are learning about the sequence of a process or classification of ideas, steps or items.

When learning a sequence, the trainer prepares envelopes that contain slips of paper on which are written each step in the sequence and gives the envelopes to the participants to arrange in the order they think is correct. It is good to do the activity in pairs so participants can discuss the steps thoroughly before deciding the sequence. Each pair in the group receives an envelope with the steps. Be sure participants know the objective of the activity.

To use the envelope exercise as a classification activity, have all the items to be classified on strips of paper in the envelope. Instruct participants to group the strips by classification.

At the end of either type of envelope exercise, be sure to process the activity ensuring that participants re-arrange the strips with the correct sequence or classifications

ANNEX-IV SEVEN WAYS TO SAY “NO”

(How To Tell Participants That They Have Not Passed The Course)

Telling participants who have not passed the competency tests that they will not receive course competency certificates is one of the most difficult duties that trainers have. The course will be harder for some participants, but they will improve with extra tutoring, encouragement, and additional chances to take the tests. But some individuals are just not capable of passing and are not to be certified. They should not have the responsibility of managing and ordering HIV/AIDS products.

The reason some participants do not succeed does not matter. It could be illness, absences, personal or family problems, vision problems, or lack of educational background. In any case, a person who cannot order correctly should not be certified. These seven points are a short guide to make the job of saying no easier.

Show Total Respect

In telling a participant that he or she is not successful, the trainer has to show total respect constantly, regardless of the person’s role, age, gender, or other status. All human beings deserve respect. When a difficult message is being transmitted, the respect is even more important.

Mention Good Points

The trainer needs to acknowledge the person’s good points. Depending on the person, the good points could include the effort put out by the participant, good attendance, active participation, the long term experience of the person, the fact that he or she is respected by other participants, the good questions that were asked, the person’s concern about serving people who want HIV/AIDS products, etc. The trainer is not saying the participant is an unworthy individual. The trainer is saying competency tests are required for certification.

Listen a Lot

If the trainer wants to be heard, the trainer also has to listen. This does not mean that the trainer agrees with excuses or arguments that the participant presents. No argument is involved. It is respectful two-way communication. The end result is better if the participant is also heard.

Repeat the Message as Needed

The conversation should not be a long one, but as the trainer listens, from time to time the message may need to be repeated. It is always brief and expressed with the same few similar words: “To receive a course competency certificate, you need to pass the competency tests.”

Mention Realistic Possibilities

Make sure that the possibilities <u>are</u> realistic. Is it possible to take the tests again from a trainer in a few weeks after more study with a supervisor or colleague? Can the participant take on other responsibilities instead of managing and ordering HIV/AIDS commodities? Can the participant come for testing again at the end of a nearby course in a couple weeks? (Notice that it is ordinarily not realistic to have the participants to take the whole course again. The slots in the course are needed for new participants, not for retakes from old participants.)

Offer to Contact the Participant's Supervisor

Some participants may appreciate this offer, but others will not. If the participant wants you to make the contact, depending on the circumstances, you might explain to the supervisor how the course is competency-based, that it is difficult, and that the participant has participated actively and made good effort. The trainer should not go into details on the specifics of the participant's performance. The specific details are between the participant and the trainer. The contact will often be made by mobile phone and should not be lengthy. It is best if you make this contact in the participant's presence, and preferably with the participant's phone. Let him or her speak first with the supervisor to explain that one of the course trainers wants to give a little information.

Let the Participant Talk to other Trainers

If the participant wishes to have further confirmation, he or she may always talk to the other trainers in the course. That is an option. Of course the trainers always need to have total cooperation among themselves. The other trainers will say no in the same way, and repeat the message as needed.

And a Couple Reminders

- The conversation is always private. This is not a conversation held in the presence of other participants.

- The conversation should not go on indefinitely. This is unnecessary and may be unproductive. After a respectful amount of time, the trainer needs to sum up and end the conversation. In many instances, the conversation will last only a few minutes anyway.

- <u>Trainers do not discuss participants with other participants.</u> The trainer-participant relationship involves a high degree of confidentiality. Trainers certainly discuss participants with other trainers. They have to. But aside from a few instances such as helping recruit a participant to help tutor another participant or asking how discussion in small groups went, trainers do not discuss participants with other participants.

- Trainers do not tell other participants who is and is not receiving competency certificates.

- At the course closing, if not everybody is getting certificates, there is a potential confidentiality problem. If participants not getting certificates are not staying for the closing, then the simple explanation, "Not everybody could be here for the closing" can be offered. If participants who are not getting certificates are at the closing, there are various options. The certificates could be sent out later. Attendance certificates, if they are available, could be given to those who do not get competency certificates. The certificates could be put in envelopes that are already at the seats of the participants as they come in. Those who don't get certificates get an envelope from the trainers thanking them for their work. None of these solutions is perfect in every case. And sometimes it does not matter. The participants have already freely told their colleagues that they have not passed the course. That is fine! But the trainers cannot tell who has not passed the course.

ANNEX – V: USING ENERGIZERS IN TRAINING

TIME: 75 MINUTES

SESSION OBJECTIVES

By the end of the session participants will be able to:

1. Define energizers;
2. Present energizers

MATERIALS

TRAINER PREPARATION

LEARNING SUMMARY

Title	Type	Time
1. Session Introduction	Lecturette	15
2. Energizers- Practice	Lecturette and Small Group	50
3. Summary	Large Group	10

LEARNING ACTIVITIES

ACTIVITY 1: INTRODUCTION TO THE SESSION

Time: 15 Minutes

Define Energizer.

Ask Participants why is use energizers in Adult Learning Training even though Adults are not kids?

Some answers:

- Create positive group atmosphere
- Help people to relax
- Break down social barriers
- Energize and motivate
- Help people to think outside the box
- Help people to get to know one another

When should energizers be introduced?

Some answers:

- The trainer should read the non-verbal communication of participants (sleepy or tired etc…)
- Between two sessions

Name some ways to energize a group:

- Icebreaker, Warm-up, Energizer

ACTIVITY 2: PREPARE ENERGIZERS – SMALL GROUP WORK

Time: 50 Minutes

Put participants in three groups and give to each group one of the three: Icebreaker, Warm-up, Energizer

Each group should come up with two activities in their category. They have 30 minutes to work on it

After 30 minutes ask participants to present to the group. Take 20 minutes for the presentation from each group and feedback from others.

Document their energizers.

ACTIVITY 3: SUMMARY – LARGE GROUP

Time: 10 Minutes

Conclude by telling participants that use the energizers when needed but take in consideration that the “analytical” participants might not like it so do not exaggerate.

THE “HANDS UP” ENERGIZER

It is better if two trainers do this energizer together, one to explain the directions and both to demonstrate the hand and arm movements, or they can both explain directions and ask the questions. All the questions given here are examples. The questions should be changed according to how far along the participants are in the course and the needs of the participants. If the questions are changed, this energizer can be done more than once in the same workshop. This energizer takes about ten minutes. There are four steps to this energizer:

Step 1. Ask the participants to <u>stand up</u> and spread out so that they will have a little space among them. Explain that you will be doing an energizer in which you ask questions. They should put their hands straight above their heads if the answer to the question is YES. If the answer is NO, they should put their arms straight to the side (without hitting their neighbour), and if the answer is MAYBE or I DON’T KNOW, they should put their hands straight out in front of them and shake their hands a little.

Step 2. The trainers should demonstrate the three hand positions and ask participants to do the same.

This means YES (Put your hands straight overhead. You can also draw a little stick man on a flip chart with his arms overhead.)

This means NO (Put your hand straight out to your sides. You can also draw a stick man on the flip chart with his hands out right and left to each side.

This means MAYBE or I DON’T KNOW (Put your hands out straight in front of you, and wiggle them left and right. Draw a stick man in that position.)

Step 3. Tell the participants that first you are going to use some practice questions to make sure they understand the idea. The real questions will come later. The trainer or trainers ask these three questions, using the hand movements, but fooling or tricking the participants with the second question. [These three questions should be changed to be sure the fit the workshop the trainers are giving.]

A. This is a workshop on logistics. (Trainers enthusiastically raise hands!)

B. Today is Monday, 25 December. (Trainers enthusiastically raise hands! But it is an error, and many participants may be imitating the trainers instead of giving the real answer. They should have their hands <u>straight out to their sides,</u> because the date is wrong. For example, it is really Monday, 10 November.)

C. It will rain tomorrow. (Trainers watch to see if participants put their hands <u>straight out in front of them.</u> Nobody knows if it will really rain tomorrow, so the answer is MAYBE or I DON'T KNOW.) Another example of a MAYBE question is, "Somebody in here has a birthday tomorrow." It is unlikely that anybody will know for sure.

Step 4. When you are sure that the participants are listening and you are sure they know the hand signals, continue with Part 4, but be sure to change the questions so the questions are appropriate. Notice that about half of the questions are technical or serious, and half are informal or funny. This is a good combination.

Examples of Real Questions. (Do not give more than ten questions per energizer.)

1. There have been stock outs in tests where I have worked.
2. I can name at least four of the six rights.
3. I will make some changes in the way we store s because of the storage principles that were presented in this course.
4. I know the names of everybody in the room.
5. I can calculate MOS fairly well.
6. In the National logistics system, information should only come <u>down</u> from the National Warehouse and the districts to the health centers. It does not go up from the health centers.
7. I will have to work hard to pass the competency test for this workshop.
8. I understand MOS and Emergency Order Point (EOP).
9. The trainers who are training us are very nice people.

THE "I SAW" ENERGIZER

Ask participants to rise. Have them standing while you give the simple instructions. Go to the centre of the room and ask them to face the centre of the room. Encourage them to change the position where they are standing so that they are more in a circle and have eye contact with everyone. (This is easy if the room is already in a horseshoe layout.)

Explain that for this energizer, the group will be visiting a place or looking at something. Each person will make up something that he or she sees. The next person will repeat what the first person said and add an additional observation. Going around the room, the third person repeats the first two points and adds one.

You will keep going all the way around the room until somebody forgets a point or makes an error, at which point colleagues politely but firmly say, “Go Home!” Timekeeper should ring the bell for emphasis!

The person sits down, and the game continues, sometimes for more than one round around the remaining standees in the room. Last person standing gets a prize!

Here is an example:

First Person: “I went to the market and I saw three goats.”

Second Person: “I went to the market and I saw three goats and a lady selling bread.”

Third: “I went to the market, and I saw three goats, a lady selling bread, and some nice mangoes.” And so on. With each person there are more things to remember and it becomes more difficult.

But you should adapt this energizer to this course. And with good adaptation, this energizer can be used more than once. It can energize and also allow participants to bring up content points they have been covering.

Have them "visit" relevant places as they describe what they saw. Note these examples:

I went to an excellent storeroom, and I saw ___________

I looked at an R&R order form, and I saw _________

I visited a busy PMTC site, and I saw _________

I looked at a Dispenser Register and I saw ______________

I made mistakes on my ICC, and I need to _____________

I looked through the SOP Manual, the Participant Guide, and my notes so far for this course, and I saw ___________

A variation on this energizer is not to do it with the large group but to have small groups of three participants prep for the visit and then send one representative to the front of the room to play the game. They will all be cheering for their person and hoping he or she can remember more things and stay standing the longest.

ENERGIZER: THE ACRONYM RACE

If you are not co-presenting, it is a good idea to recruit a judge to help with this one. he/she can help write on the flip chart and choose the winning team. The decision of the judges is final.

- Ask participants to rise. Divide them into groups. Each group of four or five has a sheet of flip chart paper numbered from one to twenty-five and a marker.
- Explain that you estimate that so far in the course, they have used 25 (or however many) acronyms. Some are part of the course and some are common technical acronyms they already know. Ask them to collaborate and race in their groups to come up with at least 25 of these acronyms. They will write the acronyms on the numbered sheet. More than 25 acronyms might make their team win. They must know the meaning of the acronym.
- Tell them they will have seven minutes for the race [but you can extend the time a little if the competition is lively]. Tell the groups they may not refer to their training materials or to posters on the walls, but they may move to a different location in the room to discourage other groups from overhearing their acronyms.
- Decision of the judges is final. Best team wins a small prize --perhaps to go to lunch first.
- An important decision to make is if only acronyms used in the course can be used of if any work-related acronyms generally recognized by the people in the group can be used. If the latter, there will be more acronyms, but you may have a harder time judging. Save time by making this decision yourself. A participatory decision will take too much time.
- Ask if there are questions. Answer any; then say, “Begin!” If you give seven minutes, it is a good idea to ring the bell and announce a one-minute warning.

- At the end of allocated time, say "Stop! Display your flip charts, please. From this point on, you may not touch your markers. Your neighbors are watching to see if you are trying to cheat and add other teams' acronyms!"

- Now you and the judge process the results, asking which team, if any, has more than 25 acronyms. Pick a promising team. Have them call out their acronyms while you and the judge decide if any acronyms are not OK, and the final total of that team. Ask occasionally what the meaning of an acronym is. Have them cross out any that are judged unacceptable. At the end, count up the acceptable ones.

- Then ask if any team has more. Then ask if the third or fourth team claim to have more. If so, give them a chance. If not, at least ask them if they have any different ones.

- There may be three final products from this energizer. First is a useful list of acronyms. Second is a chance to review them by asking probing questions about which are the hardest, newest, least frequent or whatever. Third is the prize-winning team!