

Monitoring and Evaluation Training

Do not copy, post, or distribute

What Makes a Good M&E Trainer?

We usually discuss knowledge, skills, and attitudes (KSA) as it applies to trainees. In this chapter, we redirect this focus onto M&E trainers, providing an overview of key competencies they need for M&E training. An understanding of the key skill sets and characteristics for trainers can help inform key processes for M&E training, such as

- **Recruitment of training staff or consultants**—those managing trainings are better equipped to prepare trainer job descriptions and terms of reference (ToR) and assess the skills and abilities of candidates when recruiting trainers. We will elaborate on this in the last section of this chapter.
- **Trainer self-assessment and professional development**—trainers are more capable of identifying areas to improve through courses, training, mentoring/coaching, and other forms of professional development.
- **Trainer performance appraisal and management**—those managing trainers are more capable to assess trainer performance, provide feedback, set expectations, and support the trainer's professional development.
- **Curriculum development**—those who train or support the training of trainers (ToT) are better prepared to consider and design curricula based upon competencies needed for M&E trainers.

As we shall see, M&E trainers wear several hats and play a variety of roles in addition to training facilitation. In Part 2 of this book, we outline specific guidelines for M&E training that reflect the range of competencies and related knowledge and skills we summarize in this chapter.

Learning Objectives

By the end of this chapter readers will be able to . . .

- ✓ Identify some key sources for professional standards, competencies, and ethics for M&E training
- ✓ Explain the importance of the six key competency areas identified in this chapter as they relate to the roles and responsibilities of M&E trainers
- ✓ Describe the generic steps to recruiting a trainer and key considerations for each step
- ✓ Explain the advantages and disadvantages of recruiting an internal versus external trainer

5.1 Trainer Competencies

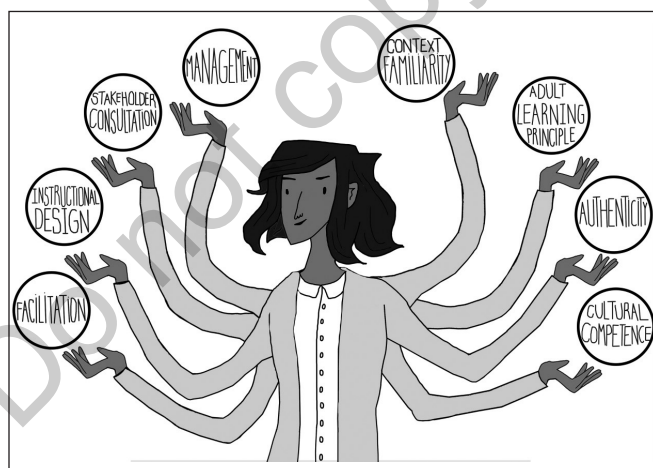
Just as the M&E training context is diverse and multifaceted, so are the skills, expectations, and responsibilities of the trainer. In addition to sound communication and a knack for explaining, trainers also provide problem solving, planning, counseling, leadership, and management. They need to interact with a variety of stakeholders in addition to trainees, such as other trainers, program and organization managers, administrators, and human resource personnel. Furthermore, trainers need to remain informed of the rapidly evolving field of training and human resource development as well as trends in M&E.

In short, training is not a “short order.” For example, the National Staff Development and Training Association (NSDTA, 2004a) identifies 29 competency areas with over a 110 specific competencies in its *Instructor Competency Model*. It is beyond the scope of this book to go into such detail, but we do want to highlight key competencies for M&E training. Following a review of sources on training and M&E standards, principles and ethics (see **Box 5.1**), we have summarized key competencies we believe are critical to highlight, organizing them into six core areas:

1. Standards & ethics
2. Technical skills
3. Context familiarity
4. Interpersonal skills
5. Management skills
6. Personal attributes

While it is unlikely a trainer will “master” all of the competencies identified, successful trainers possess most of them to some degree, and they work to improve or compensate

for those which they are deficient. In Appendix 5.1, we also provide a summary checklist of trainer competencies that can be used when recruiting trainers and inform a similar tool to assess trainers’ performance during and after training.



1. Standards & ethics

Standards, principles, and ethics are fundamental for any profession. However, for trainers this straddles

BOX 5.1

Industry Standards, Competencies, and Ethics for M&E Trainers

As with the field of evaluation, there is no universally recognized source for professional standards, competencies, and ethics for training. Instead, this will vary according to country and organizational context. Nevertheless, M&E trainers should be well informed of industry standards, competencies, and ethics for both training and M&E. Below we have listed notable sources for both fields:

- The American Society for Training & Development's *Competency Model* (ASTD, 2013)
- The National Staff Development and Training Association's *Instructor Competency Model* (NSDTA, 2004a)
- The National Staff Development and Training Association's *Code of Ethics for Training and Development Professionals in the Human Service* (NSDTA, 2004b)
- The Academy of Human Resource Development's *Standards on Ethics and Integrity* (AHRD, 1999)
- The *Code of Ethics of the National Association of Social Workers* (NSAW, 2008)
- The American Evaluation Association's *Guiding Principles For Evaluators* (AEA, 2004)
- The Joint Committee on Standards for Educational Evaluation's *Program Evaluation Standards Statements* (JCSEE, 2015)

not only the field of training itself but also the field for which people are being trained—in our case, M&E. As we note in Box 5.1, there are different sources for professional standards and ethics for both training and M&E. Nevertheless, the actual contents share many of the same elements because training and M&E both involve interacting with stakeholders to help them achieve their goals. Below we have summarized ten critical training standards and ethics that should be familiar to those working in the M&E profession:

- **Legal compliance.** Understand and observe laws and regulations governing commerce, individual rights, and client expectations.
- **Respect for people.** Reserve and promote the security, dignity, and welfare of all stakeholders, for example, establishing a safe and respectful learning environment.

Inherent within the work of both human services practitioners and those who promote their training and development are two central concepts: care and control. Developing caring relationships and valuing people are balanced with providing the right amount of control (structure/influence/authority) to promote human change and development.
(NSDTA, 2004b, p. 3)

- **General welfare.** Consult with, design, and conduct trainings to fulfill the interests and needs of all stakeholders, providing opinion, guidance, and leadership to achieve longer-term objectives.
- **Utility.** Ensure that the training serves its intended purpose, addresses legitimate training needs, and is not being used when other non-training interventions are more appropriate.
- **Feasibility.** Ensure that the training is realistic to the training context (e.g., organizational culture and budget) and uses resources in a responsible and efficient manner.
- **Integrity/honesty.** Maintain a constant commitment to being truthful, that is, when framing expectations, providing feedback, conducting assessment, and representing credentials and experience.
- **Fairness.** Remain objective and impartial in training assessment/evaluation, making judgments, and handling difficult issues.
- **Confidentiality.** Maintain confidentiality of personal information shared during training (e.g., assessment and evaluation data), and if shared, consent should be obtained.
- **Informed consent.** Ensure trainees understand and accept the intended training objectives, their expectations as participants, and any risks or consequences involved (i.e., use of training assessment and evaluation data at their workplace).
- **Professional conduct.** Monitor and check personal behavior and impulses to maintain professionalism, for example, trainers should observe appropriate boundaries between themselves and others so that working relationships are not confused with personal relationships.

2. Technical skills

M&E trainers need technical experience not only in M&E but also in training itself. Both areas of knowledge and experience are vast, and the specific technical skills required will depend on the individual training context and needs. Below we summarize five broad technical areas for M&E trainers (which can also be referred to as *hard* skills—see **Box 5.2**):

- **Subject matter knowledge and experience.** You can't teach what you don't know. Therefore, it is essential that M&E trainers have an appropriate level of understanding and command of M&E required for the training program. This will largely depend on the training focus, that is, an introductory versus a more advanced training. M&E knowledge is not enough, and it needs to be matched with practical experience to draw upon to respond to those difficult questions and to embellish instruction with useful examples to make the learning more meaningful as it applies to real-life situations.
- **Adult learning principles.** M&E trainers need to understand and apply principles of adult learning to training design, development, and delivery. They should be well versed in adult learning theory and approaches to appeal to and actively engage different learning styles. This is the focus of Chapter 4, and we summarize key adult learning principles for effective training on page 98.
- **Instructional design and development.** M&E trainers need to be able to use training assessment data to articulate M&E training objectives and outcomes, design the curriculum, and select appropriate training methods. This requires a sound understanding of adult learning principles, instructional strategies, and how different instruction methods affect how people learn. The training needs to be designed with an instructional progression that is sequenced according to the level and needs of the trainees. Related, training materials need to then be developed that are appropriate to learners' level, culture, and other attributes. These various skills are discussed in further detail in Chapter 7.
- **Assessment.** Assessment skills are indispensable at all stages of training: during the initial needs assessment, while monitoring participant learning and feedback during the training, and for post-training evaluation to assess learning transfer and related training outcomes (Chapters 8 and 9). Assessment may also involve supporting a larger organizational capacity assessment (Chapter 3). Trainers need to be well versed in qualitative and quantitative data collection and analysis methods that are practical to the training context. For instance, an organization may require very thorough learning assessments prior to, during, and after training to support individual performance development. Whatever context, the trainer should be able to interpret and communicate results to stakeholders for effective follow-up and use of assessment findings. Assessment should also uphold evaluation principles and ethics, with which an M&E trainer will hopefully be competent.

- **Technological literacy.** M&E trainers need to be able to use technology across different areas of expertise. As we discussed in Chapter 2, this includes an understanding of the various training technologies available and effectively incorporating them into M&E training to best achieve learning objectives. Technological competence is also indispensable for the development and dissemination of training materials, from training announcements to handouts and presentations. Knowledge of computer and analysis software is a valuable asset for collecting and analyzing data for pre- and post-training assessment. It is also essential for information management associated with the training (to efficiently organize, share, and use information). Finally, it is worth noting that software and applications are increasingly being developed for doing M&E, from program logic modelling to survey design and enumeration (e.g., see MandE, 2015). With such trends, technological competency for M&E training is becoming more prerequisite than optional.

3. Context familiarity

As discussed in Chapter 3, trainings are embedded in complex contexts, with different actors and factors that impact the training and its potential contribution to capacity building. A trainer's prior experience with the context in which M&E training is to be used can be a valuable asset and go a long way to establish credibility and legitimacy among stakeholders. This includes familiarity with the individuals, communities, organization, or program involved with the training as well as the larger sociocultural and political setting. For instance, knowledge of an organization's culture, management structure, and policies and procedures can help a trainer better understand and interact with stakeholders to meet training needs. In training where trainees come from a range of organizations, it may be more appropriate for the trainer to have experience with a wide array of organizations or the types of communities and initiatives in which trainees will use their M&E knowledge and skills. Familiarity with the local context contributes to cultural competence, including knowledge of local language, customs, and other dynamics with which a trainer may need to contend. However, it is worth noting that there may be instances when it is preferable to enlist an external trainer who is unfamiliar with the operational context—for example, perceived neutrality or credibility among stakeholders.

4. Interpersonal skills

Technical proficiency is not enough for good M&E training. M&E trainers need to be able to effectively interact and relate to people. This is important not only with learners during training delivery but also with other key stakeholders during training planning and follow-up. Furthermore, interpersonal skills themselves can be a learning

objective for trainees that trainers need to model and impart; there is growing attention of the importance of interpersonal skills as a core competence area for program evaluation (Christie, 2012; Ghere, King, Stevahn, & Minnema, 2006). We can consider interpersonal abilities as a type of *soft skills* (see Box 5.2), and we identify four key areas to consider them:

- **Communication skills.** The essence of a trainer's job is to effectively communicate information to others for learning. Good communication skills are also essential for stakeholder consultation during training planning and follow-up. Trainers need to be able to communicate well verbally, visually, and in writing. They need to convey information in a concise, coherent, and clear manner, so others can understand the training content, rational for decisions, recommendations, and opinions. Spoken word should be loud and clear, and the speed and emphasis adjusted according to the audience. Body language, gestures, movement, and eye contact all play an important role to engage listeners and emphasize key points. Good communication also includes knowing when and how to use appropriate visual aids (e.g., flipchart diagrams or slides) to help trainers explain or summarize concepts and ideas. A final but critical point is that communication is a two-way street, and a good communicator knows how to actively listen, solicit feedback, and respond to questions and input from others.
- **Stakeholder consultation skills.** Stakeholder consultation and collaboration is essential to ensure that M&E training is tailored to stakeholder needs. It is used to identify M&E needs, frame expectations, and help build mutual understanding and ownership necessary to support training and sustain longer-term objectives. M&E trainers need to identify, consult, and engage the appropriate people at the right time, whether it be senior management for approval and funding for training or project field staff to realistically understand M&E practice at the operational level. In organizations, it is often necessary to carefully consult with human resources (HR) to incorporate M&E into career planning and professional development. Stakeholder consultation is closely aligned with good facilitation and includes the ability to anticipate and negotiate various interest groups to encourage cooperation and collaboration.
- **Cultural competence skills.** Cultural competence is the ability to recognize and interact effectively with people of different cultures and socioeconomic backgrounds. It is related to context familiarity but specifically focuses on oneself as we relate to others who are different:

“Cultural competence requires awareness of self, reflection on one’s own cultural position, awareness of others’ positions, and the ability to interact genuinely and respectfully with others” (AEA, 2011, p. 3). A trainer should recognize and validate differences because of culture, ethnicity, gender, religion, or sexual preference. Training content, communication, and behavior should be adapted to best accommodate cultural difference—for example, anticipate linguistic differences with translations, visual aids, and appropriate activities. Trainers should be able to quickly identify and respond to any conflict or discrimination that may arise because of cultural differences. (We revisit cultural considerations in Box 9.2 in Chapter 9.)

- **Facilitation and group management skills.** Facilitation involves the management of group processes and dynamics to help different people achieve common goals, whether it is learning or strategic planning. This is an important skill not only for training delivery and adult learning but also for other aspects of training, such as stakeholder consultation and decision-making for training. A good facilitator engages and involves participants, building understanding and ownership to support and sustain training objectives. They know when to speak and offer opinion and when to remain silent and encourage others to express themselves. They also know how to summarize/synthesize key points for consensus and decision-making. Such skills should be familiar to M&E practitioners experienced in focus group discussion and participatory evaluation. Facilitation is a core skill for training delivery to support trainee engagement in and responsibility for their learning; therefore, we will revisit facilitation again in Chapter 9.

5. Management skills

Trainers need to plan, schedule, and manage a host of tasks throughout the training cycle, from the initial training analysis and design to training delivery, follow-up, and evaluation. Making all the pieces fit together in a cost-effective and timely manner requires a considerable degree of organizational and management skills. The trainers’ role in management will vary according to context; that is, whether they are providing training alone or with others to delegate responsibilities. Management can involve resourcing and budgeting for M&E training, oversight of contractual and legal agreements with clients, and the recruitment and supervision of administrative and training personnel supporting training. It also includes overseeing training logistics, such as advertising training, recruiting trainees, and arranging for the training venue, transportation, accommodation, security, refreshments, and so forth. Management can include a lot of the behind-the-scenes activities that need to be done for a training to be successful, and follow-through is essential.

BOX 5.2

Hard Versus Soft Skills

It can be useful to look at training skills as either “hard” or “soft.” Hard skills refer to trainers’ technical knowledge and experience—for example, M&E, adult learning theories, organizational development, and management. Soft skills refer to how trainers relate to themselves and others (largely reflected by one’s interpersonal skills and personal attributes). They include the ability to internalize values and principles, effectively facilitate, and build and sustain trusting relationships, commitment, and respect. Successful M&E trainers need a balance of both skill sets; soft skills allow the trainer to more effectively put the hard skills to use.

6. Personal attributes

In addition to the competencies outlined above, there are a variety of personal characteristics that are important for trainers. These are very closely related to a trainer’s interpersonal skills but also include their personal work ethic and ability to do a good job in a timely and responsible manner. Personal attributes fall within the soft skills category (Box 5.2), and we highlight ten personal attributes we believe are especially important for M&E training.

- **Organized and prepared.** Much of this book is about how to best prepare to provide effective training. Training can encompass much, and a well-planned, systematic approach helps get the job done. This is also important for the delivery of training topics in a coherent, comprehensive manner. It is typically a challenge to cover all the learning topics in the time allotted for training delivery, and an unplanned or “off the cuff” approach does not work.
- **Results oriented.** Just as adult learners are goal oriented, such qualities also apply to the trainer. This includes not only designing training with concrete, realistic results that meet training needs but also the work ethic and perseverance to follow through and achieve identifiable results. Training is a considerable investment in time and resources, and the trainer should be capable to lead the process and ensure there is a return on investment.
- **Versatile and flexible.** As this chapter reflects, there is an array of different competencies, characteristics, and responsibilities that a trainer juggles.



Jessie Mountfield

Therefore, it is helpful when the trainer can adapt to the various roles they play. Related, adaptability is also the ability to think on one's feet and respond quickly to the unexpected. It is important to know when and how to "let go" and "go with the flow." Things do not always go as planned, and if everything is set in stone, it will eventually crack. With some flexibility and openness to change, a trainer may find the unanticipated is actually an opportunity (teachable moment) rather than a hindrance.

- **Patient and accepting.** Learning takes time and adults learn better in a calm environment where they do not feel rushed or imposed upon. Patience is closely related to being accepting and respectful of others

and how they learn, communicate, and operate, whether in the training itself or with other aspects of the training. Patience and acceptance start with oneself, and trainers need to also remember not to be too hard on themselves when the inevitable "hiccup" occurs.

- **Energetic and enthusiastic.** Effective trainers are not only interested in what they do but passionate about it—both the subject matter and helping other learn it. Training is demanding, and a high level of enthusiasm helps sustain energy for its tedious aspects, for example, administrative hassles. Dynamic trainers know how to make learning active and fun, and a positive attitude is contagious, engaging learners and other stakeholders to support training.
- **Humorous and fun.** Trainers do not have to be comedians, but it is helpful if they can lighten up the atmosphere, especially when tense or difficult situations emerge. Humor is a useful tool to connect with people, and it is not limited to jokes, but also pointing out silly things, being playful, and having the humility to laugh at oneself. Such qualities can go a long way to gain rapport and earn respect with trainees.
- **Creative.** Effective training that engages learners with participatory, experiential, hands-on activities requires innovation and creativity. Rather than a pre-packaged lesson plan, successful trainers can customize and tailor it to engage the particular audience. Like a creative chef, it is important to be able to mix ingredients and spice it up rather than serve the same dish regardless of who sits down to dine. Creativity also helps with problem solving and to better respond to the unexpected.

- **Empathic.** Trainers work with and for people, therefore, it is important that they can relate to them. Successful trainers are able to bond and establish rapport, respect, and understanding with others. They are able to sense and respond to changes in feelings and emotions, show compassion when others are down, and celebrate when they are up. However, empathy needs to be genuine, and good trainers are authentic and truly connect with trainees.
- **Authentic.** People relate to and trust trainers who are authentic. In his book *The Skillful Teacher*, Brookfield (2006, p. 77) refers to “personhood” as the ability for a teacher to move out from behind their formal role as instructor and to reveal themselves as “flesh and blood human beings with lives and identities outside the classroom.” Related, successful trainers practice what they preach. Nothing undermines trainer credibility more than contradicting the very principles or commitments they expose—for example, framing a lesson as participatory and then dominating it with lecture.
- **Responsive.** The best trainers take the time to provide extra attention and assistance. They empathize with people who are struggling and will go the extra distance to help them. When trainers make themselves available to provide individual attention and feedback, it reinforces their credibility and respect—learners are assured that the trainer is genuinely concerned for their welfare.

5.2 Recruiting a Trainer

The success of training depends largely on the trainers, so it is important to carefully plan their recruitment when required. Whether recruiting for an organization or a community group, one should not underestimate how much is involved and consequently rush the process. Training consultants are often booked well in advance, and a last-minute rush to locate someone can reduce the pool of qualified candidates. Hiring an M&E trainer follows a similar procedure as recruiting any staff or consultant. Below we have outlined eight generic steps that we feel are worth considering for recruiting M&E trainers. We frame this process for training within a given organization, but it would apply similarly to recruiting trainers for other types of M&E training for individuals unassociated with the same organization.

1. Consult with stakeholders

It is a good idea to first consult with key stakeholders to ensure buy-in and support for the training exercise. Key considerations include the intended purpose of the training, alignment with overall capacity-building objectives, available resources, political

support for the training, and the time frame. It is also important to ensure that roles and responsibilities are identified for managing the recruitment process and the trainer once engaged. This may involve engaging a hiring committee or taskforce.

2. Identify M&E needs

It is important to first consider the overall training needs. An organization may have prior capacity assessment information to inform this (e.g., from staff performance reviews) or it may conduct its own training needs assessment at this stage. Oftentimes, however, training needs assessment is identified itself as a need, for which the recruited trainer will be responsible. Another important consideration is whether the training need is met by recruiting internally or externally. Using someone already with the organization or program may be preferable as part of an overall capacity-building strategy to prepare a trainers to meet long-term training needs. However, this may involve additional time and investment in a training-of-trainers (ToT) context. **Box 5.3** summarizes other key considerations for recruiting internal versus external trainers.

3. List trainer qualifications and prepare terms of reference (ToR)

A list of trainer qualifications and traits should be tailored for the specific training needs. This will also inform the scope of work (SOW) or terms of reference (ToR) for the particular training exercise or a job description for a permanent position. Also, Appendix 5.1 at the end of this chapter provides an example of a trainer competency checklist that can be used to inform this process, and following are some useful elements for the ToR or job description:

- **Purpose of the training position/assignment.** Specific technical sector or program area, trainee profile, and so forth. Ideally this can and should include the training objective, but this can later be developed with selected trainers.
- **Scope of the position/assignment.** For example, stakeholders, regions, and programs involved and whether M&E training is for organizational-wide needs, a newly established M&E unit, and so forth.
- **Training location/s, time frame and duration.**
- **Organizational overview.** For example, background information on the organization/program's history, mandate, guiding principles, existing M&E capacity assessments and objectives.

BOX 5.3

Recruiting Internal Versus External Trainers

Internal Recruitment	External Recruitment
<p>Pros</p> <ul style="list-style-type: none">• Internal trainer is already familiar with the organizational structure, policies, culture, and priorities.• Organization is already familiar with the trainer's qualifications and job performance.• Typically less costly and time consuming than going outside the organization.• Internal trainer has a long-term stake in the organization and will be around for training follow-up and support.• Vertical or horizontal movement within the organization can boost staff morale and retain staff. <p>Cons</p> <ul style="list-style-type: none">• Expanding organization or new program may not have the capacity to meet increasing training needs.• Internal politics—the selection of one trainer may cause resentment; staff may challenge trainer's credibility and authority.• Diverts trainer from normal responsibilities (unless it is to be a full-time position).• May entail additional time and costs for training-the-trainer (ToT).	<p>Pros</p> <ul style="list-style-type: none">• Provides outside experience and fresh perspective/insights that may be unavailable within the organization.• Larger talent pool could attract skilled applicants suitable for particular training needs.• Can provide a sense of external neutrality and credibility to better navigate organizational politics. <p>Cons</p> <ul style="list-style-type: none">• External consultant fees are typically higher than staff salary.• Administratively time consuming to recruit and contract.• External consultant may not be familiar with organizational culture, systems, and processes.• Risk that training content may be pre-package and not tailored to the specific organizational/program needs.• May upset staff morale and be a disincentive to not utilize internal human resources.• Current organization members may resent and challenge external authority.

- **Primary responsibilities.** Estimated amount of time to be dedicated to different training tasks, for example, training analysis, design, development, and evaluation, and any travel time involved.

- **Training methodologies.** Identify any preferred training delivery technology and approaches—for example, face-to-face, distance, e-learning, and combinations of each; participatory, experiential learning versus lecture and presentation.
- **Key working relationships.** Identify who the trainer will report to and key stakeholders to consult and work with, including whether the trainer is a team leader, team member, or will be training independently.
- **Trainer qualifications.** Required and preferred competencies and experience, including language(s) and other qualifications relevant to the specific training responsibilities.
- **Application procedures.** Where to submit the application and the materials to be included—for example, resume, cover letter, technical and financial proposal (if necessary), examples of relevant training reports and evaluations from prior trainings, and references.

See **Box 5.4** for further considerations about working with an external trainer.

4. Advertise the training consultancy or position

Post the ad for the training assignment or position to the outlets most likely to reach your potential candidates (often, an abbreviated announcement is used to direct interested candidates to the full description on the organization's website). Potential outlets for external trainers include M&E websites and listservs, training websites and listservs, appropriate program area/sector websites (e.g., community health, education), universities, think tanks, VOPEs (voluntary organizations for professional evaluators, see Box 3.2 in Chapter 3) and other professional organizations.

5. Screen and shortlist applicants

It is useful to develop a recruitment checklist to rate candidates, ensuring standard criteria and fairness in the assessment of applicants—see the example in the Appendix 5.1 for this chapter. It is also important to identify a selection committee with the adequate knowledge/experience with the organization and capacity building priorities to make informed decisions (ideally, they were identified in Step 1 and involved early on in the recruitment process). These people should also be involved in the interviews, ensuring consistency in the assessment of candidates. It is important to check references to assess past trainer performance and also review prior records of post-training reports and evaluations from training activities for which the candidate has led or participated.

6. Interview candidates

Interviews can be conducted through teleconferencing or in person; often teleconferencing will be used to identify who to shortlist for an in-person interview. The degree of rigor will depend on the particular training context—for example, location of the candidates, training budget, and duration of position. As mentioned above, it is important to have a qualified selection committee who will participate in all of the interviews. Related, interview questions should be developed beforehand based on the ToR/job description to ensure a structured interview for evaluating candidates equally. In addition to speaking to a candidate about their work experience and background, an assessment exercise can complement the interview:¹

- **Written feedback.** Provide an example of an M&E area to provide feedback on, for example, a logframe or M&E plan.
- **Hypothetical training design.** Provide a hypothetical training topic prior to the interview and ask for a short outline of how the applicant would design the training.
- **Mini-presentation.** Arrange for each candidate to demonstrate their training approach and delivery to assess their planning, communicating, and facilitation skills. This can be a mini-presentation over the Internet (e.g., with a slide show) or an in-person training session with a representative sample of trainees.

7. Hire and orient the trainer

Ensure the decision-making process is well documented, transparent, and accountable, so you can explain the criteria and process if questioned. Follow other standard hiring procedures, for example, background checks, and when the offer is made, clearly outline expectations, agreements, rates of pay, and all other relevant information so that the trainer can make an informed decision. Be sure to follow up and inform other applicants of your decision and retain their application records in case the selected trainer needs to withdraw their application. Finally, it is important to work with the trainer to develop a comprehensive training plan that goes beyond the ToR or job description and details training needs, schedule, curriculum design, and assessment. Like an inception report for an evaluation, this is important to ensure a clear understanding and realistic plan of work, checking that the training plan is in agreement with stakeholder expectations.

1. An assessment rubric should be developed of criteria for consistent and fair rating of candidate's performance for any assessment exercise used.

BOX 5.4

Working With an External Trainer

What is the ideal relationship for working with an external training consultant? Margerison (2001, p. 85) proposes four useful consulting roles to help consider this question:

1. The **doctor** is where the client has a problem and the consultant needs to diagnose and find a prescription to cure the illness.
2. The **detective** is where somebody is responsible for the problem and the consultant needs to identify and deal with the culprit.
3. The **sales model** is where the consultant has a product or service (bag of tricks) to help the client achieve its objectives.
4. The **travel agent** is where the consultant serves as an advisor to help the client on a journey toward achieving its objectives.

Like Margerison, we feel that the travel agent role is optimal. This approach allows the external consultant to truly “consult” with the client to determine needs, priorities, and solutions that are compatible to stakeholders’ realities (operational context, strategic direction, organizational culture, etc.). A partnership that actively involves the client in analyzing M&E training needs and solutions also builds needed stakeholder ownership and support to achieve and sustain training objectives. We are particularly wary of the sales model approach, where an external training consultant comes in with pre-packaged training curriculum and materials that are not tailored to specific stakeholder training needs. Such an approach should only be used if it has been well reviewed to ascertain that it is indeed in line with and will achieve the learning objectives.

5.3 CHAPTER SUMMARY

In this chapter we outline *key competencies for good M&E trainers* and briefly look at good practices for recruiting M&E trainers. Important summary points include the following:

- Understanding M&E trainer key competencies can assist with trainer recruitment, self-assessment and professional development, performance appraisal and management, as well as the development of curriculum for training of M&E trainers.
- There are a wide range of roles and responsibilities for M&E trainers. We have outline key competencies into six core areas:
 1. Standards & ethics
 2. Technical skills
 3. Context familiarity

4. Interpersonal skills
 5. Management skills
 6. Personal attributes
- There is no one recognized set of standards for M&E trainer competencies, and our list summarizes skill sets and characteristics that we believe stand out from *both* the field of M&E and the field of training.
 - To a large degree, the specific recipe of competencies for a “good trainer” will depend on the particular training context. For example, a trainer working with a team or organization may be able to share training responsibilities with colleagues (e.g., managerial tasks) and therefore may not be required to be proficient in all competency areas.
 - When recruiting a trainer for an organization, there are key considerations as to whether to recruit external or internal to an organization. For example, it may be preferable to use someone already familiar with the organizational culture who can support training transfer after training. On the other hand, it may be necessary to recruit outside experience and fresh perspective/insights unavailable within the organization.
 - We outline seven steps for recruiting a trainer, similar to recruiting any staff or consultant (and refer readers to the Example Trainer Recruitment Checklist in Appendix 5.1):
 1. Consult with stakeholders
 2. Identify M&E needs
 3. List trainer qualifications and prepare terms of reference (ToR)
 4. Advertise the training consultancy or position
 5. Screen and shortlist applicants
 6. Interview candidates
 7. Hire and orient the trainer
 - When working with a training consultant, we recommend a partnership (“travel agent”) relationship to tailor training solutions that best meets training needs.

5.4 APPENDICES

Appendix 5.1 Example Trainer Recruitment Checklist

Trainer's name:	
Training/Position:	
Date completed:	Reviewers:
Instructions	
<p>The purpose of this checklist is to provide a consistent, transparent, and accountable rubric to recruit a training consultants or staff/employee. This is only a generic example and the identified criteria should be aligned to the specific training needs per terms of reference (scope of work) or job description. A rubric can be developed to consistently rate candidates on each criteria according to training/job needs. It is recommended that a review committee with adequate knowledge/experience of the training context and capacity building priorities complete the checklist together.</p>	

(Continued)

(Continued)

Assessment Criteria	Candidate A	Candidate B
Date completed for candidate		Add additional columns as need
Dates candidate is available		
Application materials, e.g.,		
<ul style="list-style-type: none"> • Complete and on time? 		
<ul style="list-style-type: none"> • Example of relevant prior training reports 		
<ul style="list-style-type: none"> • Example of relevant prior training evaluations 		
Reference check, e.g.,		
<ul style="list-style-type: none"> • Referee A 		
<ul style="list-style-type: none"> • Referee B, etc. 		
Costs/fees (for training consultants)		
Academic qualifications		
Training experience —for example, . . .		
<ul style="list-style-type: none"> • Training background—e.g., number and type of relevant trainings 		
<ul style="list-style-type: none"> • Adult learning principles 		
<ul style="list-style-type: none"> • Training needs assessment 		
<ul style="list-style-type: none"> • Instructional design and development 		
<ul style="list-style-type: none"> • Training monitoring and evaluation 		
Technical literacy for training—e.g., familiarity with various delivery options (media) to support training		
Training management experience—as appropriate—e.g., resourcing and budgeting, recruitment and supervision of personnel, logistics and administration		
Subject matter (M&E) experience —for example, . . .		
<ul style="list-style-type: none"> • Program design (logframes, results framework, outcome mapping, etc.) 		
<ul style="list-style-type: none"> • M&E planning 		
<ul style="list-style-type: none"> • Data collection and analysis (qualitative and quantitative) 		

Assessment Criteria	Candidate A	Candidate B
<ul style="list-style-type: none"> Baseline/endline studies (e.g., household surveys) 		
<ul style="list-style-type: none"> Managing and conducting evaluation 		
Context familiarity —for example, . . .		
<ul style="list-style-type: none"> Organization: e.g., management structure, culture, policies and procedures, etc. 		
<ul style="list-style-type: none"> Program or project 		
<ul style="list-style-type: none"> Community—cultural 		
<ul style="list-style-type: none"> Local language/s, culture, customs, (potential for cultural competence) 		
<ul style="list-style-type: none"> Probable legitimacy/credibility among stakeholders 		
<p>Interview performance</p> <p>How did the applicant come across in the interview? Did they communicate clearly? Did they exhibit desired personal attributes such as enthusiasm or professionalism? Gut feelings?</p>		
<p>Assessment exercise</p> <p>Note that a separate assessment rubric should be developed of criteria for consistent and fair rating of candidate's performance for any of the above assessment exercises—see Appendix 11.4 in Chapter 11 for an example of a trainer assessment form.</p>		
<ul style="list-style-type: none"> Example of written feedback 		
<ul style="list-style-type: none"> Hypothetical training design 		
<ul style="list-style-type: none"> Mini-presentation 		
TOTAL		
<p>Additional comments—Use this space to record any additional points worth noting, etc.</p> <p>1. Candidate A:</p> <p>2. Candidate B:</p> <p>3. Etc.</p>		

5.5 RECOMMENDED RESOURCES

In Box 5.1 earlier in this chapter, we identified some key resources to consider professional standards, competencies, and ethics related to both training and evaluation for M&E trainers (each freely available online). For the field of evaluation, the website of IDEAS (2015) has a comprehensive listing of *Competencies for Development Evaluators*, with links to frameworks, reviews, and other related resources. The book by Yarbrough, Shulha, Hopson, & Caruthers (2011), *Program Evaluation Standards*, discusses in detail the thirty JCSEE standards that support core attributes of evaluation quality. Related, we also recommend the book, *Fieldbook of IBSTPI Evaluator Competencies* (Russ-Eft, Bober-Michel, Koszalka, & Sleezer, 2013), for additional information and resources to train others in this area.

Three additional resources we found useful background reading for evaluation competencies include: the discussion of standards and ethics in Chapter 9 in *Real World Evaluation* (Bamberger, Rugh, & Mabry, 2012); the 2004 issue of *New Directions for Evaluation* (Russon & Russon, 2004) on international perspectives on evaluation standards; and the article “Establishing Essential Competencies for Program Evaluators” (Stevahn, King, Ghore, & Minnema, 2005), which formed the basis for the *Competencies for Canadian Evaluation Practice*.

We will revisit cultural competence in Chapter 10 on training implementation and refer readers to Box 10.4, which highlights the useful workbook, *Culture Matters* by the Peace Corps (2014). Other resources we recommend on this topic include

the *American Evaluation Association Statement on Cultural Competence in Evaluation* (AEA, 2011); the evaluation guide by CDC (2014), *Practical Strategies for Culturally Competent Evaluation*; and the article, *Cultural Competence in Evaluation: An Overview* (SenGupta, Hopson, Thompson-Robinson, 2004).

In addition to the two resources identified from the National Staff Development and Training Association in Box 5.1, NSDTA (2015) produces a useful series of competency guides to support effective staff development and training programs. Additional resources for training competencies include the competency model and related resources on the website of the ASTD (2015); the Experiential Training and Development Alliance (2000), which provides a concise discussion on the definition and ethical practices for professionalism in experiential training and development; *Ethics for Training and Development* (Gordon & Boumhart, 1997); the statement on the *Code of Ethics* by the National Education Association (NEA, 2015); and the checklist, *Duties of the Teacher*, from prominent evaluator Michael Scriven (1994).

Two books that we found useful to consider key competencies for trainers and education include *The Skillful Teacher* (Brookfield, 2006), with a very insightful Chapter 4 on what students value in teachers, and the book by Heron (1999), *The Complete Facilitator's Handbook*. Lastly, we refer readers to the recommended resources identified in Chapter 10 on training facilitation and the freely available training of trainer (ToT) guides recommended in Chapter 10.