



What would be the next steps for them after the end of the training programme. (*Elicit that all the new ideas developed need to be put into practice.*) Do these activities need to be prepared, or can we undertake them straight away without any preparation. (*Elicit that some planning is required.*) What about your own social planning in your family? (*Elicit that some social events might have been planned, or if not planned, they are due such as planting, harvesting, trip to relatives, school fees due to be paid, repayments of loans, etc.*)

Hence, there are already planning cornerstones which will be taken into account while integrating their business activities into it. Some might be complementary, others in conflict with the social planning. Example: school fees are due, but the business requires some investment during the same month.

- (2) Let some participants cite individual examples regarding the social events in the three months to come. Then, inquire about business activities directly related to the planning they have been doing during the last days. Ask them if they will be able to memorise all these activities? If the answer is YES, then congratulate them. If the answer is NO, then explain that a simple tool might help not only as a planning but also as a monitoring guide with which they can check at any point in time if they are still in line with their planned activities.
- (3) Take the case of one volunteer (e.g. rice trading). Let him (her) cite the activities to be undertaken during the next three months (social events first, business later). Write them (if possible using additional symbols) on ZOPP cards; bear in mind that all single social activities, even loan applications of family members, field works, etc., need to be listed which could have an impact on their business planning.
- (4) Once all these activities are listed, ask the volunteer to set the cornerstones (activities which MUST be done!). Tick-mark these ZOPP cards. Then, inquire about the sequence of those activities (*which activity needs to be done first, second, etc.? Let him (her) express verbally! Remind them of a logical sequencing!*).

Write the names of the following three months (symbols) into the prepared chart (see **Annex 1**). Explain the different columns per month and inquire what the four sub-columns could eventually mean (*Elicit: four weeks*). Now ask the volunteer to put the first, second, third and so on activity in sequential order on the ZOPP board. Place the respective cards into the left "activities" column.

- (5) Check if they really think that the sequence is correct. Then, inquire how much time the first activity would need to be concluded; allow them to add a certain security margin so that the planning does not become too tight. Draw a vertical line in the appropriate boxes (per week) so that the expected time frame is covered. Proceed to the second activity card and ask, if this one could start simultaneously or only after the first activity is finished. Draw again a time bar according to their answers. Likewise, complete the Gantt Chart in front of all participants so that they fully understand the concept.
- (6) Distribute the individual A4-sized individual action planning charts and ask all participants to work individually in their groups (similar businesses) with the help of one coach who has been assigned beforehand. Encourage them to write symbols for their different activities instead of letting the coaches do their job. Explain that during follow-up visits it will be checked in how far they have followed their plans. But mention likewise, that every planning is only as good as are the present ideas and convictions. New events tomorrow might change the whole planning with all specific activities.
- (7) Make sure that all participants fill in their forms by keeping close contact with the co-facilitators (coaches).

**Caution** : Some participants find the Action Planning Chart too abstract and don't understand the explanations.

The sequence of the participants' activities mentioned doesn't seem to be logic.

**Hints** : Take sufficient time to make sure that the chart's structure is properly understood.

Inquire into the logic of their sequences (*why is it like this?*); if there are no parallel activities during the example, then provide at least an idea of how it would look like (time bars) if two or three activities take place simultaneously. In some cases, participants may want to change accordingly.

Remind them that in many cases the market survey needs to be properly done so that this activity might be among the most important ones in the beginning of the planning period.

**Integrate the baseline survey of participants' and focus on the following indicators:**

- **Income during the last year (divided by 12 months), i.e. levelling of seasonal fluctuations,**
- **Machinery and equipment (if any),**
- **Number of animals (if animal husbandry or fisheries; i.e. stock),**
- **Any other individual indicator which seems useful to you.**

**Variations** : Not yet known.

**Processing** : Thank them for their efforts and tell them to keep these action plans up-to-date and to bring them along for any follow-up meeting which will be announced in time.

Collect their feelings regarding the accomplishment of this task. Support those ideas which talk about a supportive tool which is required, and question those which highlight the pain in planning. *Without this pain a good launching of the business is highly unlikely. Their advantage could be the knowledge of their competitors and the market which enables them to do proper planning. Their competitors are not yet aware of their plans.*

If possible, fix already the date for the next follow-up meeting.

Inquire, if they would feel fit to do a similar planning for the next three months in case a follow-up meeting cannot be organised in time. In case of a negative answer, why not? What is the obstacle in doing so. Activities can be earmarked in the form of drawings and symbols (if they know what the pictures mean, it is highly sufficient).

Explain that during the follow-up meetings further action planning will be discussed and done in practice.



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<b>Exercise</b>	: Baseline survey
<b>Code</b>	: END – 2-baseline
<b>Source</b>	: Torsten Striepke
<b>Tested in</b>	: Gazipur / Bangladesh <b>Date:</b> 2/98 <b>By:</b> CoT Gazipur
<b>Target group</b>	: Illiterates

**Objectives** : Provide the organising agency with baseline data regarding the economic performance of the course participants,  
Provide a structure for the ongoing monitoring process (the form is meant for the baseline survey as well as for the permanent monitoring process),  
Encourage the participants to apply some indicators for an auto-evaluation of their business performance.

**Use** : Ending part,  
Monitoring & evaluation.

**Time** : 10 minutes per participants (survey is done during one of the last sessions).

**Requirements** : One or two facilitators,  
Monitoring (*baseline survey*) sheet (see **Annex 1**);  
Pencils.

**Setting** : Participants in the setting required for the respective session during which this survey is conducted. Call one by one; it is suggested to have an informal setting. Make sure that there is a certain privacy during the talk.

- Steps** : (1) Approach the participants individually and explain the reasons for this survey (keep record, measure impact of the training programme, show them the use of some indicators which they might be able to apply without external assistance, etc.) Assure them of absolute secrecy between the two of you and an impartial evaluator who might drop in after some years to check long-term impacts of the training programme.
- (2) Treat point by point as mentioned in the baseline survey sheet. Some questions can only be surfaced through intensive discussion (such as yearly income) and computations. If one question (line) does not apply in some cases, please, cross it out so that the evaluators will know that the question was not forgotten.
- (3) Thank them for their help.
- Caution** : Some participants may not like the idea to disclose certain sensitive facts and figures (such as savings!).
- Some indicators might turn out to be not very important in some target groups.
- Hints** : Do not press participants to assist in filling in the survey sheet; tell them that they would be missing a chance for auto-evaluation. You might also explain that the organising agency is in need of some data to measure the training programme impact which cannot be done without their active help. If they don't like to answer to certain questions, they may say so. In this case, write "answer refused" on the form.
- In case new indicators will be identified by you or the field staff of your organisation, don't hesitate to change the survey sheet (*the earlier, the better because this will have an impact on the monitoring and evaluation of all other training programmes!*).
- This baseline survey sheet also serves as a basis for the follow-up visits if no new indicators have been identified.
- Variations** : Change or addition / omission of indicators.
- Processing** : Will be done by the evaluator of each organisation and the GTZ project.

**Annex 1**

**Monitoring (baseline survey) Sheet**

*Also used for baseline surveys. Note that some issues are to be checked on a quarterly basis. Only participant-owned items are taken into consideration*

**Name:** \_\_\_\_\_ **Date of CEFE-training:** \_\_\_\_\_

**Age:** \_\_\_\_\_ **Marital status:** s / m / w **Date of visit:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Business:** \_\_\_\_\_ **Date of creation:** \_\_\_\_\_

1. **Monthly income** (yearly income divided by 12 = monthly income)

_____	_____ Taka	_____	_____ Taka
_____	_____ Taka	_____	_____ Taka
_____	_____ Taka	_____	_____ Taka
_____	_____ Taka	_____	_____ Taka

Yearly total \_\_\_\_\_ Taka      ./ 12 = **Monthly:** \_\_\_\_\_ Taka

2. **Machines/Equipment** (worth more than 200 Taka – purchasing price)

_____	_____ Taka	Date: _____ (Y)
_____	_____ Taka	Date: _____ (Y)
_____	_____ Taka	Date: _____ (Y)
	<b>Total</b>	_____ Taka

3. **Land under cultivation** (agricultural plots, ponds, sheds, etc.)

(measure the surface in square-feet or decimals) **Ownership ?**

_____	_____ ft <sup>2</sup> / dec.	_____
_____	_____ ft <sup>2</sup> / dec.	_____

4. **Possession of animals**

_____	_____ (number)	_____	_____ (number)
_____	_____ (number)	_____	_____ (number)
		<b>Total value:</b>	_____ Taka

5. **Savings / credit / book keeping**

**Cash** \_\_\_\_\_ Taka;      **Bank:** \_\_\_\_\_ Taka  
 Name of bank: \_\_\_\_\_

**Credit:** \_\_\_\_\_ Taka;      **Source:** \_\_\_\_\_

**Loan repayment** regular: Y / N      **Book-keeping** practice maintained: Y / N

6. **Use of non family labour-days during the last quarter (or month)**

\_\_\_\_\_ (days)

7. **Investment into present business (during monitoring visits, check reinvestments)**

\_\_\_\_\_ Taka

8. **Number of working days lost during last quarter** (illness, family problems, etc. – please, specify)

**Reasons:** \_\_\_\_\_ (days)

\_\_\_\_\_  
 \_\_\_\_\_

9. **Business problems encountered during the last quarter (month)**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

10. **Entrepreneur's salary fixed:** Y / N;      If yes; \_\_\_\_\_ Taka11. **Other observations made by the visiting evaluator (describe)**

(such as: advertising, status of M/C & equipment, stocking, cleanliness, training programmes)

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Name of evaluator: \_\_\_\_\_



<b>Exercise</b>	: Satisfaction of expectations
<b>Code</b>	: END – 3-satis-expect
<b>Source</b>	: Torsten Striepke
<b>Tested in</b>	: Dinajpur/ Bangladesh <b>Date:</b> 8/98 <b>By:</b> Abdul Wadud
<b>Target group</b>	: Illiterates

**Objectives** : Check in how far the validated participants' expectations have been satisfied through the training programme,  
Prepare for the final evaluation.

**Use** : Ending module.

**Time** : 20 minutes

**Requirements** : Lead facilitator

ZOPP board,

Pointer,

Kraft paper with participants' expectations mentioned during the first day of the training <see OPEN – 5-outline>

**Setting** : Participants seated in usual U-shape setting.

**Steps** : **(1)** Display the Kraft paper with the participants' cards containing their expectations and ask if they still remember them!

- (2) Read out the cards one by one while mentioning the name of the respective author (watch the respective personal symbol attached!). Let the author express in how far (s)he thinks that his (her) expectations could be satisfied during the training programme. If satisfaction have been achieved, then put another ✓ mark, if not make a X, and if it's still doubtful, put a question mark (?).
- (3) If the last card has been checked in this way, summarise the level of satisfaction as you perceive it from their answers and provoke a general statement by the whole group.
- (4) Lead over to the final evaluation exercise by pointing out that you would require some more feedback from their side as to which extend some exercises have been perceived and some important issues are judged by them.

**Caution** : Some participant don't recognise their own cards because other expectations might have emerged in-between.

Others laugh how they could have had such expectations now that they have witnessed how this training programme operated.

**Hints** : Point out, if required, the different marks on all expectations cards which have been put during the "Levelling of expectations" step being part of the course outline exercise (see < OPEN – 5-outline>). Expectations which were rated as part of the training programme, were marked ✓, those which were definitely outside the frame of the prepared training programme were marked X, whereas those which could eventually be fulfilled were marked (✓).

**Variations** : (1) Group the expectation cards according to certain categories before starting the session. These categories could be: technical training (aspects), marketing, loans, financial issues, and other expectations without a clear direction. The latter may be put under the label "Miscellaneous" or "?".

**Processing** : Emphasise that it is possible that the training programme could not satisfy all expectations, desires and demands but remind them that the managerial aspects (marketing and financial management) are key issues in each business so that it was intended to bring them forward in this field. technical training might be offered elsewhere in the area so that they could attend at any time.

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<b>Exercise</b>	: Final evaluation		
<b>Code</b>	: END – 4-final-evaluation		
<b>Source</b>	: CoT		
<b>Tested in</b>	: Gazipur Bangladesh	<b>Date:</b> 2/98	<b>By:</b> U Thein Maung / Kohinoor Yeas- mine / Ghulam Rabbani
<b>Target group</b>	: Illiterates		

**Objectives** : Evaluate the training programme,  
Receive feedback for improvement.

**Use** : Ending part,  
Evaluation.

**Time** : 45 minutes

**Requirements** : Lead facilitator, co-facilitators (record keeping),  
  
ZOPP board,  
Questions prepared on flip chart,  
Markers,  
Writing pad (to note down the participants' comments),  
Pen.

**Setting** : Participants sitting in usual U-shape setting.

**Steps**

: (1) Explain that the facilitators will have to learn about some important impressions of the participants as far as the whole training programme is concerned. The daily mood barometer *<if it was not discontinued>* gave some basic ideas about their day-to-day feelings and reactions, but now some more substantial feedback is required. This feedback will be carried out in two phases: an incomplete sentence- and a discussion round. The incomplete questions are designed in a way that the participants will have to complete the sentence in their own ways expressing their own impressions and convictions vis-à-vis the CEFE training programme.

(2) Start with the first **incomplete sentence** and ask for completion starting from the participant sitting on the left side next to you:

- At the end of this training programme, I feel more confident to ...

Encourage the participants to speak out freely whatever they think regarding this issue. Make sure that all of them have ample time to express their views. Repeat the incomplete sentence every time you shift to another participant. Likewise, continue with the following incomplete sentences during the next rounds:

- The most difficult exercise / part of the training was ...
- My 3 most important personal learning points are ...
- For an advanced training programme of this type (same duration), I would be ready to pay ... Taka.

One co-facilitator notes down all answers in short form which is required for the final training programme report.

(3) Lead over to the second part (discussion) which will take part in a special set-up (**fishbowl**). Invite half of the participants to form a circle and sit down. Instruct the others to stand behind them (larger circle) at a distance of 2 meters so that there are pairs (one in the inner and another one in the outer circle!). Explain that only the participants in the inner circle are allowed to discuss the topic provided by the facilitator. The participants in the external circle are merely observers and spectators. However, if – after some time of listening – they wish to participate in the discussion, they tap on the shoulder of their partner in front of them who will have to stand up to exchange places.

- Was the learning through symbols appropriate; are less/more symbols required or is any other method preferred?

Allow only 5 minutes for each discussion as usually arguments are repeated. Continue with the following topics:

- What do they still lack in terms of knowledge, know-how or skills which could not be satisfied during this training programme?
- Are duration (12 days) and daily schedule (5 hours) ok or are there any other suggestions? Remember that time was quite short to deal intensively with all topics.
- Are your expectations fulfilled with which you came to the training programme *<reveal their expectations shared during the first day>*? Are there any new expectations which emerged during or after this training programme?

Again, one co-facilitator notes down all answers in short form required for the final training programme report.

(4) Tell them that their answers have been noted down so that the facilitators and the organising agency will take care of the necessary improve-

ments in case a similar training will be conducted in this area or elsewhere.

**Caution**

: Participants are too kind to come up with any sort of criticism or own opinions.

During the incomplete-sentence part, the participants have a tendency to repeat what has been already expressed.

Fishbowl: participants don't tap shoulders so that no exchange of place occurs.

**Hints**

: The questions might be displayed on ZOPP board or flip chart if some participants are semi-literate; this visualisation also helps you to repeat the incomplete sentences with the same wording.

Encourage the participants to mention freely their opinions because the programme cannot be improved without their constructive feedback; explain that you are desperately looking for constructive comments (as you have provided constructive criticism during their business planning exercises). This is the best way to improve!

The word "expectations" should be circumscribed by the ideas they had in mind while paying their fees before attending the actual programme. *What did they think they will gain from this training programme while enrolling?*

Encourage participants to do shoulder tapping so that their arguments and voices can be heard; eventually, have a break during the discussions and explain again. Explain again that everybody's opinion is of concern to you. Do not allow that participants change places wildly and that those of the outer circle interfere at any point in time; once control is lost, it is difficult to re-establish the required order.

3<sup>rd</sup> Incomplete sentence: make sure that the participants take only their personal learning points into consideration so that repetitions can be avoided (*Explain that everyone learns differently!*).

Regarding the last incomplete sentence (fees), give some introduction regarding production costs in general (issues they know from the training) and about the organisation of this training programme (material, food, facilitators, rent, etc.) in particular so that they can imagine that huge costs were incurred.

Invite them to talk to their neighbours, friends and other villagers about their impressions during this training programme. They might be candidates to participate in the next training of this kind.

**Variations** : Questions should be tailor-made according to the group dynamics and the events which took place during the training programme.

**Processing** : Not required