

**ZUELLIG FAMILY FOUNDATION**  
**ZFF Institute Learning and Development Manual<sup>1</sup>**  
February 2021

**INTRODUCTION**

The ZFF institute (ZFFI) being the training arm of the Foundation has been serving as the resource center for developing Bridging Leadership (BL) products, conducting training activities, and ensuring the quality of training programs rolled out by the Foundation, its academic partners, and external resource persons. To systematically facilitate the implementation of these core services, ZFFI, with the assistance of SEAMEO Innotech, developed protocols and process flows aligned to its overall business operations. Since 2019, ZFFI has been implementing its learning and development (L&D) protocols that serve as a useful tool in assisting all staff in the planning, development, implementation, management, and evaluation of all L&D activities. The protocols are also translated into a charter database for proper monitoring with a tight feedback loop to immediately address quality and brand management issues.

This manual has been drafted to complement the implementation of the L&D protocol. It underscores the works of ZFFI and the role of the operations unit for L&D collaboration. It is designed to be read like a book and is developed in a way that allows for it to be utilized as a whole or as stand-alone parts, depending on the needs of the user.

**THE INSTITUTE AS THE LEAD UNIT FOR LEARNING AND DEVELOPMENT**

In pursuit of wider application and institutionalization of L&D protocols toward comprehensive and calibrated management of all training programs and activities offered by all ZFF units, ZFFI came up with a strategy to capacitate all operations unit to execute their L&D functions. To start, ZFFI will provide an orientation to comprehensively discuss the training tools and processes including all requisites in the delivery of training (*see Figure 1*).

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<sup>1</sup> *This manual is classified as internal document unless needed as a reference for external partnerships.*

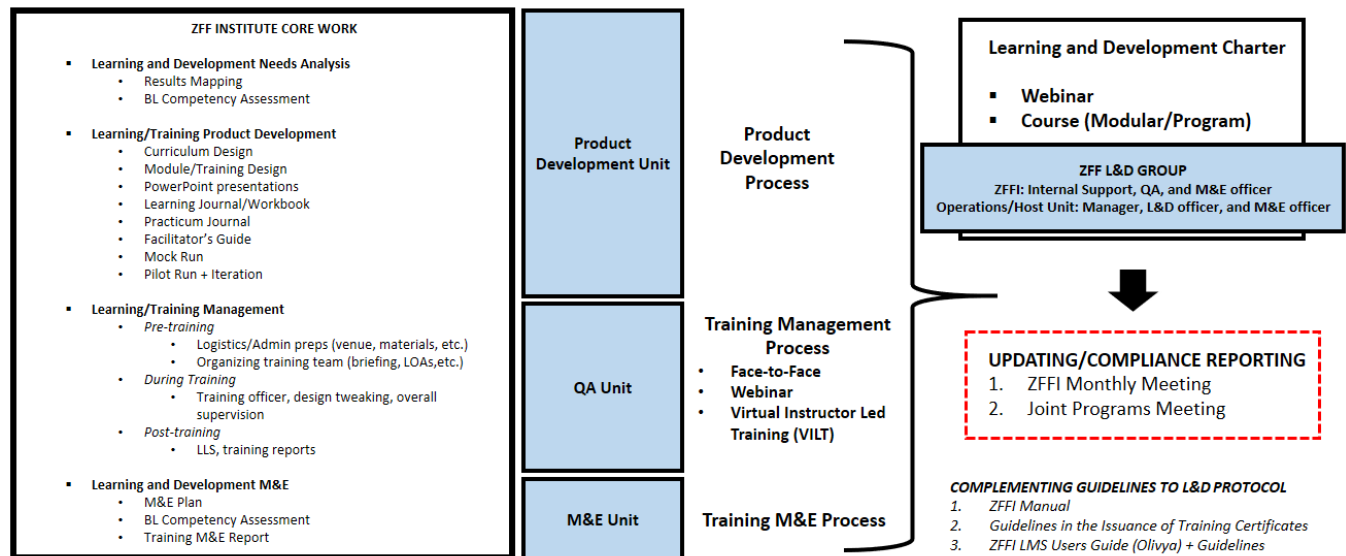


Figure 1. ZFFI Operations vis-à-vis L&D Protocol and Charter

## THE INSTITUTE AND ITS SUBUNITS

### Bridging Leadership (BL) Formation Unit

The BL formation unit takes the lead in ensuring quality product development as well as training implementation following the ZFF brand. It is divided into two main subunits - internal support and public offerings, which cater to internal and external partners, respectively. The internal support subunit focuses on providing product development and training support to ZFF internal programs, including prototype program units as well as expansion partnership projects. Learnings from these prototypes feed into the design development of public programs. As such, a close relationship between the two BL formation arms is maintained for quick transfer of knowledge and rapid mainstreaming of programs based on prototype findings.

### Internal Support Subunit

The internal support subunit takes the lead in providing technical assistance and support to the learning and development needs of ZFF's program and project units. It is made up of the internal support manager, along with L&D associates who are assigned to specific thematic areas corresponding to priority strategies of ZFF. Examples of thematic areas are Nutrition, Adolescent Sexual and Reproductive Health, and Local Health Systems. Taking the role of process and ZFF brand guardian, the internal support subunit offers its expertise in product development and training management to ensure that program and project units can deliver quality learning and development interventions.

The ZFFI L&D associates are tasked to coordinate with the designated L&D officers of each program/project unit to provide support in ensuring their program timelines are followed and the development of relevant L&D products subscribe to the L&D protocols for such. The L&D Officers from

each program/project unit are accountable to their respective units in ensuring compliance with their timelines, brand requirements, and protocols. With guidance from their respective program/project managers, they take the lead in the product development as well as training management processes of their respective units, with ZFFI L&D associates providing the necessary technical and process support in every phase.

The L&D officers of each program/project unit are also tasked with developing the L&D Charter, together with their counterpart ZFFI L&D associate. The L&D Charter highlights key milestones in program planning, development and implementation, timelines, as well as roles and responsibilities of both ZFFI and operating units. The ZFFI L&D associate together with the QA and certification associate monitors the Charter and provides recommendations on moving forward, as the need arises.

The following sections describe the L&D Product Development and Training Management processes being followed organizationally:

- L&D Product Development Process

The internal support and public offerings subunits both have product development experts as part of the team to ensure ZFF standards and brand quality are upheld in the creation of learning products. In keeping with the institutional strategies and directions, ZFFI utilizes a results framework and a competency-based approach in the design and development of modules, training materials, and M&E plan to ensure the application of leadership competencies contribute to the achievement of learning and performance outcomes. Development processes about this are detailed below (e.g., results mapping workshops, content mapping, materials development writeshops, and the like) are co-facilitated between ZFFI and the implementing project units to ensure the outputs are aligned with the overall program goals, objectives, standards, and desired outcomes.

To ensure that co-creation takes place between the units, modules and learning materials are developed based on an approved L&D project charter or any other similar document that outlines agreed-upon deliverables and timelines between the ZFFI and project teams. The project manager of the operations team, together with the assigned ZFFI L&D associate/manager to the project, ensures that this is accomplished before the program launch to ensure the entire L&D runway is accounted for and planned out for the rest of the implementation period. The charter provides details including key milestones and outputs in the product development process, materials to be developed, workshops to be conducted, schedules of practice and actual runs, and vetting/approval processes.

Program owners and ZFFI must conduct regular monitoring and updating of the L&D project charter to ensure that the planned outputs are produced as scheduled and to identify possible red flags and causes of delay that may arise. Any interventions or agreements to address the causes of delay must be written in the project charter for documentation and monitoring purposes. It will also form part of the updates of ZFFI during joint programs meetings.

All products (designs, materials, workbooks) must be vetted with and approved by the agreed-upon levels of authority. Vetting may also call for the involvement of external funding partners, depending on the requirements of the partners. Relevant inputs and feedback received during vetting sessions are integrated into the product before the next step in the process to ensure that the materials that will be used in the actual run are approved by the relevant levels of authority.

All prototype materials shall be validated for the effectiveness of content and process through a pilot run. The pilot run is the first formal implementation of a particular module, as delivered to actual target participants. Revisions shall be based on such prototype runs and feedback from all identified sources such as Lessons Learned Sessions and daily evaluation.

Final vetting and approval of the prototyped design and materials shall be done before turnover to the end-user, following the agreements in the project charter.

- Training Management Process

Training management processes are grouped into three phases – Pre-Training, In-Training, and Post-Training Phases. In addition, with the ongoing digitalization of the organization, training management processes for those activities delivered via methods other than the traditional face-to-face have also been defined. These methods are further segregated into **synchronous online** and **asynchronous** modalities. **Synchronous online training and learning activities** refer to those in which learners and instructors are in the same online platform at the same time, with the same learning content. **Asynchronous training and learning activities** refer to those in which learning happens at the pace of the learner, with the learner and the instructors accessing the materials at different times. This may be done through self-paced courses in the Learning Management System, as well as other flexible learning solutions that will be developed by ZFFI (e.g., non-internet requiring materials such as hard copies of modules and workbooks, digital copies in portable drives/devices, etc.). The processes for each of these phases are described in detail in the succeeding sections.

When units enter into the Training Management phases, it is with the assumption that the product development processes have already been followed and observed.

### ***Pre-Training Phase***

- **Face-to-Face**

Before the conduct of the training, the host unit (i.e., program/project manager of the operating unit directly implementing the training activity) shall ensure that a draft training design is prepared, training team is formed, and resource persons and participants are identified.

The following roles in a Training Team shall be designated and defined prior to the conduct of the activity:

| <b>Role</b>   | <b>Function</b>  |
|---|--|
| <b>Training Manager</b>                                 | <ul style="list-style-type: none"> <li>▪ Manages the overall training run</li> <li>▪ Assists the training team members if needed</li> </ul>  |
| <b>Training Officer (Session and Process Guardian)*</b> | <ul style="list-style-type: none"> <li>▪ Ensures the integration and synthesis before and after each session</li> <li>▪ Connects one session from the other</li> <li>▪ Assists the resource speaker as necessary during SLEs and other activities</li> <li>▪ Ensures that the host team for the day does its roles and responsibilities</li> <li>▪ Manages the time in each session daily</li> <li>▪ Introduces the team members</li> <li>▪ Facilitates Lessons Learned Session</li> </ul> |
| <b>Resource Speaker/Facilitator</b>                     | <ul style="list-style-type: none"> <li>▪ Conducts each session assignment and facilitate the learning of the participants</li> <li>▪ Adheres to the quality standards and protocols during the duration of the training</li> </ul>   |
| <b>Training Secretariat (1:25 Participants)</b>         | <ul style="list-style-type: none"> <li>▪ Prepares the needed materials for the entire training conduct</li> <li>▪ Assists in the distribution of the worksheets and in SLEs (e.g. publishing etc.)</li> <li>▪ Ensures that all the worksheets during the training are accomplished and submitted including the action plan, daily evaluation and the attendance sheets</li> <li>▪ Prepares the signed certificates of participation and appearance for the participants</li> </ul>         |
| <b>Documenter</b>                                       | <ul style="list-style-type: none"> <li>▪ Documents important insights and outputs during the training (pictures, learning journal etc.)</li> <li>▪ Documents the daily evaluation review (i.e., Lessons Learned Session)</li> <li>▪ Collects other outputs of participants from Training Secretariat</li> <li>▪ Drafts training completion report</li> </ul>   |

*\*Assigned training officer may change each day*

A training timeline, including administrative and logistical needs, shall also be prepared, presented during a meeting, and reflected in the learning and development charter database.

The training team must allot enough preparatory time before the actual conduct of the training activity to complete the following:

- A. Learning Contract Form, Data Privacy Form, and BL Competency Assessment Tool collected and analyzed
- B. Training Design and Facilitators' Guide finalized
- C. Training materials prepared and ready for distribution
- D. Pre-training meeting/mock run completed
- E. Administrative and logistical concerns addressed
- F. Venue Ingress
- G. Directory/Profile of Participants

M&E officers of each program/project unit are expected to have been oriented on these documentation requirements and have the necessary tools and forms to accomplish them.

The training team shall meet at least a day before actual training to do other necessary preparations.

▪ **Synchronous Online (Webinars)**

For a webinar, the host unit shall ensure that a draft design is prepared, a support team is formed, and resource persons and participants are identified before its conduct.

The following roles in a webinar shall be designated and defined before the conduct of the activity:

| Role                    | Function   |
|-------------------------|--|
| Overall facilitator     | <ul style="list-style-type: none"> <li>▪ Facilitates of the webinar</li> </ul>   |
| Co-facilitator          | <ul style="list-style-type: none"> <li>▪ Co-facilitates the webinar</li> </ul>   |
| Zoom Room Host          | <ul style="list-style-type: none"> <li>▪ Manages the Zoom room being used and monitor the participants (mute, video off, etc.)</li> <li>▪ Takes the group picture</li> </ul> |
| Resource Person/s       | <ul style="list-style-type: none"> <li>▪ Prepare and submit presentation material</li> <li>▪ Deliver topic/session assigned</li> </ul>                                       |
| Back up Hosts (Co-Host) | <ul style="list-style-type: none"> <li>▪ In case internet of Main Host fluctuates</li> </ul>   |
| Harvester 1             | <ul style="list-style-type: none"> <li>▪ Captures key insights/discussion points and reflect in the chatbox</li> </ul>   |
| Harvester 2             | <ul style="list-style-type: none"> <li>▪ Back up to Harvester 1; captures the key insights and discussion points in a separate word document</li> </ul>                      |
| Harvester 3             | <ul style="list-style-type: none"> <li>▪ Monitors questions in the chatbox and relays to facilitator</li> </ul>  |

|                 |   |
|-----------------|---|
| Harvester 4     | <ul style="list-style-type: none"> <li>▪ Documents questions and answers in a separate word document</li> </ul>   |
| Evaluation Host | <ul style="list-style-type: none"> <li>▪ Conducts evaluation at the end of the activity</li> </ul>  |
| Webinar Admin   | <ul style="list-style-type: none"> <li>▪ Prepares certificates for participants</li> </ul>  |
| Documenter      | <ul style="list-style-type: none"> <li>▪ Documents important insights and outputs during the training</li> <li>▪ Documents the LLS</li> <li>▪ Drafts webinar completion report</li> </ul> |

A webinar activity timeline, including administrative and logistical needs, shall also be prepared, presented in a meeting, and reflected in the learning and development charter database.

- **Synchronous Online - Virtual Instructor-Led Training (VILT)**

For synchronous online activities (Virtual Instructor Led Training-VILT), the host unit shall ensure that a draft training design is prepared, a training team is formed, and resource persons and participants are identified.

A training team similar to webinars shall be designated and defined before the conduct of the activity, and a training timeline, including administrative and logistical needs, shall also be prepared, discussed in a meeting, and reflected in the learning and development charter database.

Similar to face-to-face training activities, the training team must allot enough preparatory time before the actual conduct of the training activity to complete the following:

- A. Learning Contract Form, Data Privacy Form, Online Readiness Assessment, and BL Competency Assessment Tool collected and analyzed
- B. Reservation of Zoom meeting room
- C. Training Design and Facilitators' Guide finalized
- D. Training materials prepared and ready for distribution
- E. Pre-training meeting/mock run completed
- F. Administrative and logistical concerns addressed
- G. Testing of Zoom meeting room
- H. Directory/Profile of Participants

M&E officers of each program/project unit are expected to have been oriented on these documentation requirements and have the necessary tools and forms to accomplish them.

Technical roles should also be clarified and possible connectivity issues anticipated to ensure that the activity will run as smoothly as possible.



- **Asynchronous**

Before the start or launch of the asynchronous course, the host unit shall ensure all participants have access to the learning management system and that course materials are available for use and distribution. The Learning Contract Form, Data Privacy Form, Online Readiness Assessment, and BL Competency Assessment Tool, and other preparatory documents required for the course shall also be collected and analyzed.

M&E Officers of each program/project unit are expected to have been oriented on these documentation requirements and with the necessary tools and forms that are needed to accomplish these.

### ***In-Training Phase***

- **Face-to-Face**

All sessions to be run during the actual conduct of the activity shall be based on the final/approved Training Design and Facilitators' Guide.

Host Unit **or the assigned training manager** shall ensure the following are completed in each training activity:

- A. Pre-test and post-test
- B. Attendance Sheet

The training manager can mobilize the members of the training team to ensure that the necessary documentations are completed. S/he shall likewise ensure that integration and synthesis are conducted at determined stages of the training activity.

A ZFFI-assigned QA officer ensures compliance to the QA and M&E protocol for the in-training phase and submits relevant evaluation tools to the training team. S/he also participates in daily evaluation reviews to provide feedback on the implementation of the sessions and the training activity as a whole.

- **Synchronous Online (Webinars)**

All sessions to be run during the actual conduct of the activity shall be based on the final/approved webinar topic/design.



Host unit **or the assigned overall facilitator** shall ensure that the following are completed at the end of the webinar:

- A. Attendance/Directory of Participants
- B. Webinar Evaluation (Poll)
- C. Lessons Learned Session

M&E officers of each program/project unit are expected to have been oriented on these documentation requirements and have the tools and forms to accomplish them.

Host unit shall likewise ensure that webinar flow is seamless and time allocation is managed properly.

- **Synchronous Online - Virtual Instructor-Led Training (VILT)**

All sessions to be run during the actual conduct of the activity shall be based on the final/approved Training Design and Facilitators' Guide.

Host unit **or the assigned training manager** shall ensure that the following are completed in each VILT activity:

- A. Attendance Sheet
- B. Evaluation of Participants (Poll)
- C. Lessons Learned Session

The host unit shall likewise ensure that pre-test is administered on the first day while post-test is on the last day of VILT. In addition, integration and synthesis shall be conducted at determined stages of the VILT.

A ZFFI-assigned QA officer shall ensure compliance to the QA and M&E protocol for the in-training phase and submits relevant evaluation tools to the training team. S/he also participates in daily evaluation reviews to provide feedback on the implementation of the sessions and the training activity as a whole.

- **Asynchronous**

The host unit shall ensure that the following are completed in each training activity:

- A. Pre-test and post-test
- B. Session assignments/reflection papers/other requirements

The host unit's assigned course manager shall monitor participants' progress toward course completion through regular reviews of the learning management course. Regular

check-ins and progress status reviews via other methods shall also be applied by the host unit when flexible learning solutions have been used by the learners.

### ***Post-Training Phase***

- **Face to Face/Synchronous**

Host unit shall ensure that a training completion report is prepared and submitted to the unit M&E officer upon completion of the training to be uploaded in the interunit monitoring data drive.

- **Asynchronous**

The host unit shall ensure questions from participants are addressed and processing is done, if necessary. If needed, a synchronous processing session shall be scheduled to provide a space for learners to collaborate with the instructors.

### ***Public Offerings Subunit***

Under the current ZFFI organogram, the public offerings subunit is in tandem with the internal support program to form the BL formation unit. These two units are put in parallel to each other, given the expectation that L&D products developed through the help of the internal support unit shall contribute to the development of public offering packages. As such, the product development expert works closely with the internal support manager (who, in turn, is actively involved in the L&D work of ZFF's operations and partnership project units) in curating and selecting L&D packages that can be offered publicly.

The team also includes a content development associate, who is in charge of translating L&D products into online materials that can be uploaded in the ZFF LMS.

The training management associate, who was previously in charge of ensuring brand quality in public program training activities, shall now be tasked to oversee and manage the implementation of programs, courses, and webinars. S/he shall work closely with the associate director in ensuring that each offering is implemented following the set M& E standards and ZFF branding guidelines.

Similar to the internal support subunit, the public offerings subunit also follows the product development and training management protocols of ZFF, with the ZFFI public offerings team taking on the role of the host unit.

### **Quality Assurance and Certification Unit**

In general, the QA and certification unit will be in charge of monitoring the compliance of all units in the implementation of the protocols and report updates that include the status of agreements covered in the L&D project charter (on time, delay, variances, deviations, or non-compliance) during ZFFI and joint

program meetings. The monitoring of L&D project charter is a joint commitment of the QA and certification unit together with the ZFFI internal support team and the project owners. The QA and certification unit is also in charge of assigning qualified QA officer to conduct quality assurance audit for training.

### ***Quality Assurance Audit for Training***

The Quality Assurance Audit for Training (QAAT) is a systematic and independent assessment and evaluation activity conducted to monitor the compliance of the training team and the resource persons with the requirements defined in the training management protocol, ensure that sessions are delivered efficiently and effectively, and minor missteps are addressed properly and/or controlled.

QAAT is applied in all BL-based training programs following the prescribed evaluation procedure. For webinars, orientation activities, and technical training programs, session evaluation is not required but will need to have a daily evaluation and lessons learned sessions conducted and documented.

Apart from the QAAT, the QA officer shall also ensure that other evaluation activities are conducted and tools are accomplished by the identified user/evaluator. Below is the summary for reference:

| <b>Name of Activity</b>                                       | <b>Evaluation Activities</b>              | <b>User/Evaluator</b> | <b>Frequency of Collection</b>        |
|---|---|-----------------------|---------------------------------------|
| Modular Sessions – Synchronous                                | Online Poll/Daily Evaluation-Synchronous  | Participants          | At the end of the session/activity    |
|   | Online Session Evaluation (Online SEF)    | QA Officer            | At the end of the session/activity    |
|   | Lessons Learned Session                   | Host Unit/Team        | At the end of the session/activity    |
| Modular Sessions/Stand-alone activities – Asynchronous        | Online Poll/Daily Evaluation-Asynchronous | Participants          | At the end of the session/activity    |
| Stand-alone activities – Synchronous (Webinars and Colloquia) | Online Poll/Daily Evaluation-Synchronous  | Participants          | At the end of the session/activity    |
|   | Lessons Learned Session                   | Host Unit/Team        | At the end of the session/activity    |
| Modular Session/Training (Face-to-face)                       | Daily Evaluation (DEF)                    | Participants          | Daily                                 |
|   | Session Evaluation (SEF)                  | QA Officer            | Daily, Per Session                    |
|   | Training Management Evaluation (TMEF)     |                       | Once, At the end of training activity |
|   | Lessons Learned Session                   | Host Unit/Team        | Daily                                 |

### ***Quality Assurance Officer***

In addition to the orientation provided at the beginning of engagement with operations unit, all staff will be capacitated to conduct QA audits of training programs and to do the overall monitoring of the collection and submission of evaluation tools for processing and analysis. The QACP officer or his duly

appointed representative will also assist with the onboarding of new QA officers and will provide feedback for improvement. A pool of QA officers (preferably BLTCP training facilitator and designer) will be established to address the growing demand for experts who will function as assessors of training quality.

The QA assurance officer is a qualified individual who completed the basic BL foundation courses, basic L&D course, and content-based Training of Trainers (CBTOTs). Any individual who took part in the designing and development of training program and materials is exempted from taking the content-based Training of Trainer (CBTOT) provided that s/he attended the mock run of the training to broaden his/her understanding of the overall training design and session objectives, as well as build up content mastery.

In performing the quality assurance audit for training, it is imperative for the QA officer to follow the evaluation procedure and utilizes the approved evaluation tools. All significant findings should be discussed during the Lessons Learned Session (LLS) or in a separate post-session discussion and processing with the resource person. It is also important to take note of all agreements made and recommended interventions for future reference. All details of the session assessment including platform observations should be written in the session evaluation forms or in separate assessment notes that will serve as attachments. Moreover, the QA officer, along with the training officer, has to provide the overall QA oversight including the validation of daily evaluation. S/he is vested with the authority to decide over emerging issues on administration and regulation of training program conducted.

ZFFI, through the quality assurance unit, shall ensure one quality assurance officer is assigned in all training activities especially during pilot runs. It is, however, important for the host units to notify or send their request for QA officer to the institute QA unit through email at least a month before the actual run to give the ZFFI ample time to look for available QA officer/s from its pool. For late or absence of notice, the program owner will automatically assume the responsibility.

### **Knowledge Management, Monitoring and Evaluation Unit**

The ZFFI knowledge management and monitoring & evaluation (KMME) unit is responsible for establishing the system supporting the monitoring, evaluation, and knowledge-building activities of the institute. It includes organizing, managing, and utilizing the capacity-building data to provide useful and timely information to all relevant program stakeholders. KMME is also responsible for facilitating knowledge building and sharing within the Institute and its partner providing technical inputs on policy studies and training programs enhancements.

#### ***Overview of Training KMME Process***

To objectively measure the learnings of trained participants including the application of acquired knowledge, skills, and attitude toward their work, the KMME unit has established a training monitoring and evaluation (M&E) process in which it is anchored on Donald Kirkpatrick's "Level of Training Evaluation" (see Figure 2).

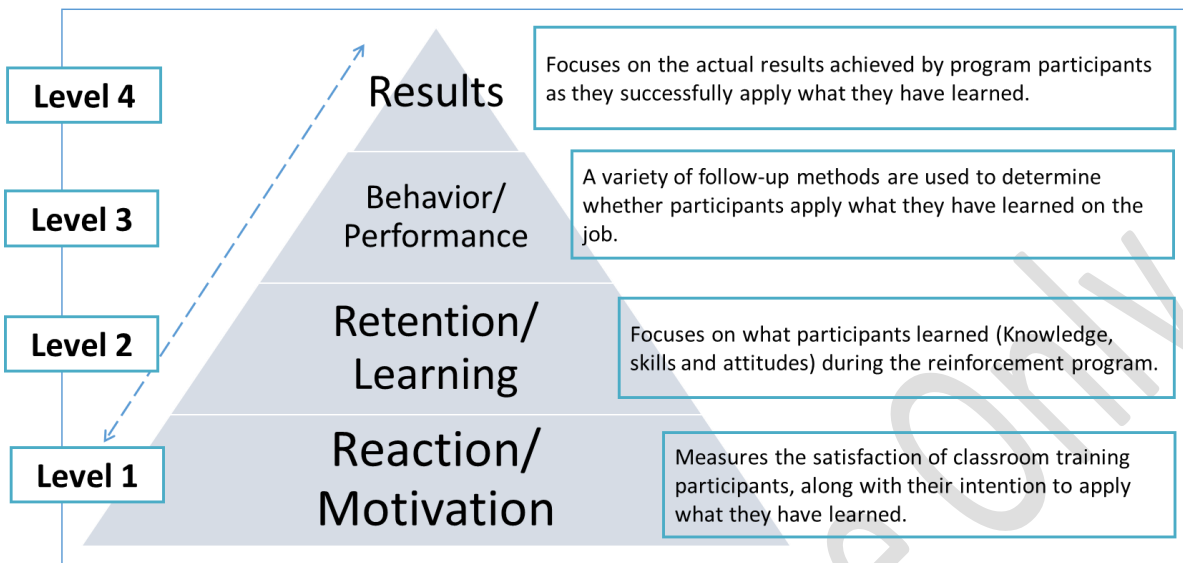


Figure 2. Donald Kirkpatrick's "Level of Training Evaluation"

The first level (Level 1: Reaction, Satisfaction and Planned Action) of evaluation measures reaction as it gives immediate feedback on what particular aspect of our training run participants like or dislike. Knowing the participants' reactions also helps in strategically tweaking the training methodologies or flow on the actual run to make the conduct more conducive to learning. Usually, the Daily Evaluation Forms (DEF) are used to measure this.

The second level (Level 2: Retention/Learning) of evaluation, on the other hand, focuses on what participants learned (competencies) during the training program. A learning test like a pencil and paper test as well as skills demonstration are the usual tools used to ensure that participants have absorbed the content and know how to use it properly. This evaluation level measures the change/improvement in knowledge and learning to enhance the training content, objectives, prerequisites skills, target audience, method of delivery, among others.

Furthermore, the success of the application of the learning of the trained participants is gauged using the third level of evaluation (Level 3: Application and Performance). The frequency and use of skills that resulted in the achievement of practicum milestones is one of the common measures of the application of learning. Included in this evaluation level is also the review of the provision of planned practicum support for the trained participants.

Lastly, the impact of the training programs on the sending organization (Level 4: Results/ Impact) is also assessed. The fourth level of evaluation focuses on the actual results achieved by program participants as they successfully apply what they have learned. Usually, for ZFF programs, these are the systems changes (e.g. improvement in the technical roadmap) being brought about in their application of learning and improvement in competencies.

The Training M&E (TME) Process starts on the drafting of the Training M&E Plan (version 2019) by the program's M&E officer as well as the conduct of baseline assessments such as the BL competency assessments, learning style assessments, health system assessments, among others identified by the program owners.

The institute, through the KMME, shall review the drafted Training M&E Plan from the program team to ensure the alignment of objectives vis-à-vis the metrics set in measuring each level of training impact. It is, however, important for the program owners to send the drafted TME Plans at least two weeks before the actual run to give the Institute ample time to review and give feedback.

During the conduct of the training, the program's M&E officer also leads the collection, encoding, processing, analyzing, reporting, and storage to the institutional data drive of the accomplished in-training relevant forms (e.g. attendance sheets, data privacy statements, tests, evaluation forms, etc.) and other tools required by the program and following the course's training M&E plan. After the training is conducted, a Level 1 and Level 2 evaluation workshop will be scheduled together with the ZFFI M&E officer to assess the performance of the in-training courses.

At least a week after the practicum period, it is recommended to conduct the Level 3 evaluation workshop to be facilitated by the ZFFI M&E officer together with the program team. All relevant practicum documents (e.g. updated BL Competency assessments, updated action plans, public narrative, etc.) encoded and stored in the institutional data drive will be used in the analysis.

A Level 4 evaluation will be scheduled depending on the need and plans of the program owners.

In these series of workshops, the insights gained and recommendations identified will be then given to the program owners together with the product developers for enhancement of the products. The enhanced products created will then be included in our library of materials.

### ***Support from other units***

In the implementation of these protocols, the following are the critical partners from other units identified:

- Program Monitoring and Evaluation (M&E) Officer

The program M&E officer, in partnership with other members of the team, shall be the one accountable for the collection, encoding, processing, analyzing, reporting, and storage into the institutional data drive of the accomplished relevant tools and documents required by the program.

- Program Knowledge Management (KM) Officer

The program KM officer is seen as a critical stakeholder during the training evaluation workshops as s/he will ensure that all insights and recommendations are gathered and be utilized during enhancement of knowledge products including but not limited to training designs and materials.

- Knowledge Management Group (KMG) M&E and KM Officers

At the institutional level, the KMG's M&E officers and KM officers will play a big part in the utilization of gathered data from the operation's unit as well as in the Institute. Particularly, for the institutional M&E, the analysis at the institutional level of the roadmaps, health data, and other relevant information encoded in the institutional data drive is expected of them. Insights from the analysis are expected to be shared and disseminated at an institutional level by the institutional KM officers or learning managers.

### **LEARNING AND DEVELOPMENT CHARTER**

A centralized learning and development charter database was developed to ensure efficient execution of all agreements made between the ZFFI and other units in the development, management, and evaluation of all training activities.

The QA and certification unit together with the internal support and KMME teams shall work together in monitoring the centralized learning and development charter database and ensure all unit learning and development officers provide regular updates.

A meeting is scheduled every month to discuss the program status updates and identify interventions for variances. If any of the preparatory work required is not met as prescribed in the protocol, ZFFI may recommend the postponement of the activity. The QA and certification unit shall be responsible for updating the unit director and/or deputy executive director through email on the recommendation of deferment. Other updates shall be discussed as necessary during the joint programs or learning management committee meetings.

#### ***List of Learning and Development Processes***

| <b>Process Name</b>  | <b>Latest Version Available</b> |
|--|---------------------------------|
| Product Development  | 01/2021 version                 |
| Training Management – Face to Face                           | 10/2020 version                 |
| Training Management - Webinar                                | 10/2020 version                 |
| Training Management – Virtual Instructor-Led Training (VILT) | 10/2020 version                 |
| Training Monitoring and Evaluation                           | 10/2020 version                 |



***List of Training Evaluation Tools***

**Face to Face**

| <b>Name of Forms</b>                       | <b>Latest Version Available</b> |
|--|---------------------------------|
| Daily Evaluation Form (DEF)                | 11/2020 version                 |
| Session Evaluation Form (SEF)              | 11/2020 version                 |
| Training Management Evaluation Form (TMEF) | 11/2020 version                 |
| Lessons Learned Session Form (LLSF)        | 11/2020 version                 |

**Online**

| <b>Name of Forms</b>  | <b>Latest Version Available</b> |
|---|---------------------------------|
| Online Session Evaluation Form (OSEF)                         | 11/2020 version                 |
| Lessons Learned Session Form (LLSF)                           | 11/2020 version                 |
| <b><i>Other reference: Online Evaluation Poll Content</i></b> |                                 |

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