



Center
of Excellence
in Finance



How Learning and Knowledge Sharing Can Work for You

GUIDELINES FOR EXPERTS



Funded by the
European Union

Implemented by the Center
of Excellence in Finance



Why the guidelines

Dear experts,

We have prepared these guidelines for you – our **international experts and representatives of the Network of Regional Experts** (hereafter experts) who work on strengthening the capacities of line ministries to measure the fiscal implications of structural reforms.

With this document, we explain how we believe learning and knowledge sharing take place at the CEF and how it can also be interesting and fun. We wish to show you how we can collaborate to deliver dynamic and engaging learning events that bring forward the understanding of what is a structural reform and how to integrate it into the overall fiscal frameworks of Western Balkan countries and Turkey.

Feel free to contact us if you aspire to share your knowledge with your peers. Alternatively, you may simply regard these guidelines as a reminder of key learning points from our training-of-trainers learning event where we addressed how to design and deliver participatory and reflective learning activities.

We want to make sure that you will feel comfortable working with us. You have extensive technical and practical expertise related to the application of the European Commission's Economic Reform Programme (ERP) Guidance Note, and we will complement it with our knowledge of how learning and knowledge sharing take place and which learning methodologies to use.

Working together, we can assure that participants learn in an interactive manner, from you and from each other, as we strongly advocate learning by sharing good practices among peers. We are convinced that you will enjoy meeting a room of like-minded people and form new professional relationships in a welcoming environment.

We hope you will find these guidelines useful!

CEF team

How learning and knowledge sharing work at the CEF

Our approach includes close cooperation with you, our experts, in the design phase. We assure that your experience and knowledge of the topic are included in the overall course design. We pair your content expertise with our methodological insights to ensure that our learning events are relevant and enjoyable.

We use **participatory approach to learning**. This includes:

- Understanding and keeping pace with the learning needs of Western Balkan countries and Turkey regarding their structural reform agendas.
- Ensuring that the learner is at the heart of the learning process.
- Using a wide range of learning methods and tools to maximize interaction between experts and participants, and among participants.
- Incorporating participants' feedback before, during and after the learning event.
- Showcasing the skills and knowledge that participants acquire: how they personally, their teams and institutions have benefited.



DESIGN, DELIVERY AND EVALUATION OF LEARNING EVENTS

EACH OF OUR LEARNING EVENTS HAS THREE MAIN PHASES



DESIGN



DELIVERY



EVALUATION

Here is what you can expect in each phase while working with us. 

Design

We work closely with you, our experts, in the design of a learning event. In this phase we jointly:

- Identify the audience – TARGET AUDIENCE
- Set learning objectives and outcomes – LEARNING OBJECTIVES
- Select appropriate delivery modes – LEARNING METHODOLOGIES
- Agree on how we will monitor and evaluate the program – EVALUATION

During this process, we draft the **EVENT OUTLINE**. We then publish this information on our website and share it with potential participants in the region. The CEF event facilitator will send you a template of the outline at least three months before the start of the event to ensure that we work together well in advance to design a relevant learning initiative.

Each outline includes the following information, which we ask you to help us fill in:

- **Event description**
 - What will participants learn
 - How will participants benefit
 - Who should attend
- **Lead experts**
 - with short CV of each of our speakers
- **Practical information**
- **Delivery partners**



TARGET AUDIENCE

Our participants are Western Balkan and Turkish public sector finance officials at top, middle and junior levels who are involved in the design, fiscal planning, implementation and coordination of structural reforms and ERP.

In creating the event outline, we need to make sure whom our learning event is for. Once participants have applied and been selected, we will send you a list of participants with background information. The typical workshop at the CEF is for 20–25 participants.

PRINCIPLES OF ADULT LEARNING

As our participants are experienced professionals, it means that they come to the CEF with their own knowledge and perspectives that can be nicely incorporated in the course. However, adults tend to learn differently from younger students.

It is good to have in mind the following guidelines before and during any learning event.

CEF BLOG ON LEARNING

If you are interested to find out more about effective learning and knowledge sharing practices, we invite you to visit our blog on learning. Here we regularly share our reflections along with the lessons learned on ways we capture, package and share knowledge and experience.

▶ www.cef-see.org/blog

ADULTS LEARN BEST WHEN:

1. They participate fully in the training.

This may seem obvious, but attending a learning event does not mean the same as *participating* in it. Participatory learning means that everyone is involved and active. Throughout different activities we assign participants to various roles (e.g. time-keeper, note-taker, spokesperson, and similar). We also rotate these roles throughout the event.

2. They feel valued and respected for the experiences and perspectives that they bring to the classroom.

We involve participants in deciding on the content and skills that will be covered during the event.

3. They see the relevance and immediate value of learning.

Using actual experiences that participants can apply to their own work contexts makes learning more relevant.

4. They approach learning as problem-solving.

We offer participants the opportunity to use their own experiences and creativity to solve realistic problems and test different scenarios of proposed solutions in a safe learning environment.

5. They have an opportunity to reflect on new concepts and link them to their own experience.

We allow sufficient time in-between the sessions for reflection and discussion, so that participants will have the time to process the discussed subject matters and contextualize them.

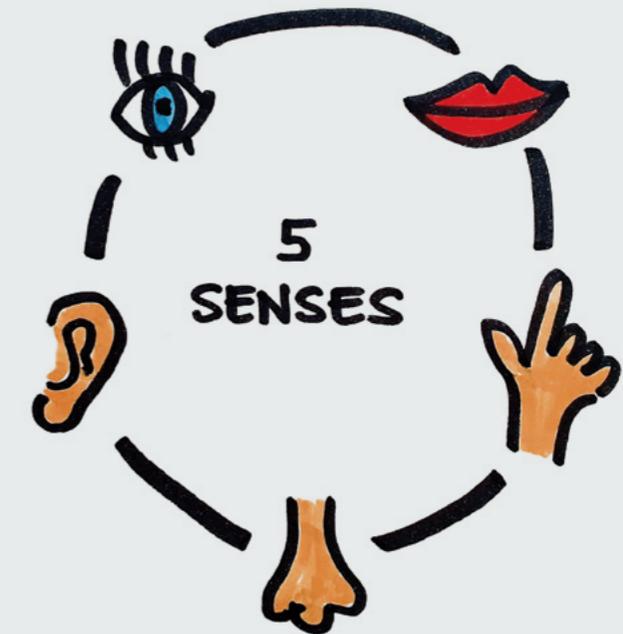


We would also like to point out to differences in how we learn versus what we remember.

It is believed that:

WE LEARN:

- 1% through TASTE
- 2% through TOUCH
- 3% through SMELL
- 11% through HEARING
- 83% through SIGHT



WE REMEMBER:

- 10% of what we READ
- 20% of what we HEAR
- 30% of what we SEE
- 50% of what we SEE and HEAR
- 70% of what we SAY
- 90% of what we SAY and DO

Therefore, it is important that our learning design include options for participants to practice what they learn and become actively involved in the learning activities.

LEARNING OBJECTIVES

To better understand the participants' learning needs, we prepare pre-event surveys and assignments for participants to get specific input on what they need and want to learn.

With pre-event surveys, we want to understand as specifically as possible:

- Participants' learning needs and expectations.
- Potential application of their newly acquired knowledge.
- Existing knowledge of the topics to be discussed at the learning event which can later be compared with improvements in learning and understanding of the topic.
- Participants' preferred learning styles.

In cooperation with you, the CEF event facilitator will prepare this pre-event survey, distribute it among the participants, and share the findings with you.

Feedback helps us create **learning objectives** in line with participants' and their institutions' needs. These guide our decisions on the content and methodologies.

Learning objectives should be **SMART**:

-  **SPECIFIC**
-  **MEASURABLE**
-  **ATTAINABLE**
-  **RELEVANT**
-  **TIMEBOUND**

Once we understand the learning needs, we can start designing the **AGENDA**.



LEARNING METHODOLOGIES

It is also our role to make sure that different learning styles are taken into account at the design stage, so that the learning events allow participants with different learning styles to learn to the fullest extent possible.

Learning styles have a great influence on the learning process. They guide the way people acquire knowledge, since they define how people internally represent experiences, recall information, and even choose the words to express their ideas. Here is a presentation of the VARK model of different learning styles, but there are many others.

LEARNING STYLES DETERMINED BY THE PREFERRED SENSE – VARK MODEL

- **VISUAL:** One prefers using pictures, images, and spatial understanding.
- **AUDIO:** One prefers listening to speeches, sound and music.
- **READING and WRITING:** One prefers using words, reading and writing.
- **KINAESTHETIC:** One prefers using the body, hands and sense of touch.

Learning can make use of a variety and combination of learning methods and tools.

Delivery

Making learning initiative happen is exciting, demanding, and, we hope, very satisfying for you as an expert. We are with you throughout the event delivery to assure that it runs smoothly and that participants' different needs, interests, and learning styles are taken into account.

Our role is to combine your experience with our knowledge of methodological design to make sure that course delivery is as interactive, participatory, and methodologically diverse as possible.

We will also take measures to ensure that learning space is conducive to learning and that our participants will feel safe, comfortable, and relaxed.

Throughout the event, your CEF facilitator will be compiling a digital story to capture and convey the lessons learned, and share relevant materials, research findings and highlights of discussions.

We provide coffee and lunch breaks for our participants and experts. We typically organize either a city tour to make sure you all get acquainted with the host city, or a similar informal networking event. Such a gathering is an important element of an effective learning experience, as it offers an opportunity to meet and form new friendships and professional ties that last beyond delivered events.

A photographer will take a posed group portrait and usually visits one of the class sessions for more candid shots as well.

At the end of the learning event, we provide participants with certificates of attendance. The final »ceremony« is facilitated by us, and we are delighted to have you participate as well.



We suggest that varied **learning methods and tools** be used that take into account different **learning styles** and make the experience interactive, stimulating, and fun. Another guideline is to use 70% of active teaching methods and 30% of passive methods. On the right you can see some examples.



Here are some examples of learning methods and the type of learners that find them the most useful:

Learning method	Learner's style
Lecture	Audio
Whole class, small group or pair discussions	Audio
Presentation with slides	Visual
Online demonstration	Visual
Hands-on computer work	Kinesthetic
Ordering activity (e.g. individuals/pairs/groups have to put the steps of a process in the correct order)	Kinesthetic
Group work activities	Kinesthetic

Learning method	Active	Passive
Brainstorming	x	
Explaining subject matter to each other	x	
Role play exercise	x	
Case study	x	
Discussion	x	
Lecturing		x
Video watching		x
Watching a demonstration		x



EXAMPLE OF AN ICE-BREAKER: BINGO

WHAT IT IS

It's fun, energetic and short introductory exercise that helps participants get to know each other in an informal way by learning interesting facts about each other. And it is run as a competition between participants.

HOW IT WORKS

Participants receive a bingo sheet and they need to walk around the room until they find people that match the facts listed on a bingo sheet. These facts can include funny or bizarre things. For example:

- Likes coffee over tea
- Has run a marathon
- Speaks more than 3 languages

Once a person successfully gets all the signatures, he or she shouts »BINGO!« and wins. The winner shares his/her answers with the whole group and receives a small prize.

HOW LONG IT TAKES

The activity takes around 15–20 minutes, including the debrief session.

IDEAL GROUP SIZE

From 10 to 30.



CREATING SAFE ENVIRONMENT

For learning to work best, participants need to find themselves in an environment where they feel safe, comfortable and ready to grasp new information. In such a state of mind, they will remember the experience as interesting.

Together we need to create a nice environment for everyone involved. The CEF will guide you in this, having in mind the following, to decide what would work best:

- **The room:** the physical size, setting, are there any barriers, light, temperature, the acoustics and microphone, air.
- **Yourself, as expert:** your knowledge, how well you know the subject, have you practiced the delivery of your presentation, the loudness of your voice, how you are organized, your interactive approach, your posture, formality and appearance.
- **Your audience:** size of the group, their age and gender structure, participants' job positions, level of prior knowledge of the subject, is it a difficult subject, will there be questions, is there an expert on the subject in the room, etc.

POWERFUL PRESENTATION

Whatever tool you are using to support your presentation in class, the slides are a nice tool for putting down your thoughts, but they should not be the primary means to convey your message. Try not to think about a learning event as a training or a meeting, think of it more as an experience to remember.

SOME TIPS ON HOW TO MAKE THE BEST USE OF POWERPOINT

Since the PowerPoint presentation remains widely used for teaching, we share some guidelines how to use it wisely and to your advantage.

PowerPoint is ideal to distill out the main messages of more complex content and make them more accessible and visually compelling. It is meant for presentations, that is »seeing,« not reading in-depth. So, it is worth considering what this tool is best for and where it might work better as a complement to the rest of the content.

BREVITY

- Less is always more: think of the text as headlines.
- After about 50 words, consider a new slide.
- Avoid sub-bullets/multiple levels of bullets – always a sign of need to create another slide.

FORMATTING

- Some formatting (such as bold or italic) would be good anytime the text is as long as two full lines or more.



①

KNOW YOUR MATERIAL

②

GET TO KNOW EQUIPMENT

③

TELL A STORY

④

USE VISUALS

⑤

KEEP IT SIMPLE

⑥

KEEP EYE CONTACT



READ FROM THE SLIDES

ASSUME YOU KNOW EQUIPMENT

GET OFF TOPIC

TALK TOO FAST

PRESENT WITHOUT REHEARSING

LOSE KEY MESSAGE

- Bear in mind that it is easy to read fonts with clean edges (like Arial), compared to those with different features (like Times New Roman).
- However, double emphasis (bold + underline) can be overkill.
- Screen captures, pictures or graphs are a great way to illustrate your points, but make sure that the pictures used are large enough and clearly linked to your point. That means, they can be read without much explanation, yet are easy to remember.

DENSITY

- One main content item or takeaway per slide. If you need to compare two graphs, for example, consider simplifying to highlight the point of comparison, rather than pasting in the original graphs in all their complexity.
- Distraction factor: you cannot really perform well while presenting complex slides; the audience will struggle to read on-screen, or read a printout rather than pay attention to you.

WHERE TO PLACE FULL DETAILS

- Move details (descriptions, sub-bullets) to the notes section; they will still be there in the version that you can send afterward.
- Never use footnotes in the main body of the slide.

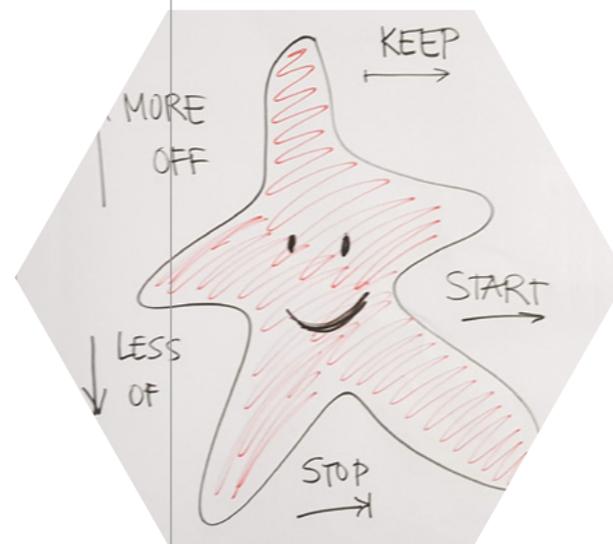
FINAL SLIDE IS A BRANDING OR MESSAGING OPPORTUNITY

- Often your last slide stays on screen for the longest, during a discussion or Q&A session. A slide that says only »Thank you« is a wasted opportunity.
- Think about the message that you would like to keep in people's minds during the discussion or, at a minimum, display your organization's name and logo.

SOME FACILITATION TIPS

In your role as the learning facilitator, you will be guiding participants and assist them in their own learning, help them keep focus and connect bits and pieces of discussed subject matters into one coherent story. We invite you to consider some of the below tips on facilitation to create a favorable learning experience. Also keep in mind that the CEF event facilitator will be right next to you to help make it all run smoothly.

1. As part of the design process, it is important to consider also your own teaching style and build your own repertoire of learning methods that you feel comfortable using.
2. Arrange your learning points in a way that makes things clearer and more logical for the participant.
3. Expect the unexpected – always have plan B ready (and also C 😊).
4. Collaboration is a learned process. Manage it purposefully through different learning methodologies and tools at hand that will allow you tap into participants' new ideas and information.
5. Not everyone needs to participate in the same way but try to engage all participants in what is happening in the classroom. An effective way to do that is by asking them for help. Purposefully group them according to the information that we will gather in advance.
6. Steer a conversation by asking powerful questions that induce curiosity versus those that require obvious yes/no answers.
7. Incorporating elements of games or gamification are proven methods that make learning more effective. Gaming elements that complement traditional learning methods increase participants' engagement in assigned tasks, make them fun and help participants form teams.
8. Any type of collaboration activity will mostly last longer than you have planned, so allow some buffer time.
9. Give participants time to reflect on new concepts and link them to their own experience. Encourage them to share what they have learned with their colleagues at workplace.
10. Have fun – you are on a learning journey too!



EXAMPLE OF A REFLECTION/BRAINSTORMING METHOD: STARFISH RETROSPECTIVE

WHAT IT IS

This is an effective experience sharing facilitation method that fosters thinking around practices and the value we get from them.

HOW IT WORKS

Draw a starfish on the flip chart, pose a question and seek for participants' views across five different perspectives:

- **What we need more of** ► these are the practices that are being applied in your working environment but you think that there should be more of them or that they are not taken full advantage of.
- **What we need less of** ► these are the current practices that might need refining because they are not helpful or productive any more.
- **What are the things we need to keep** ► these are good practices that you consider worth keeping.
- **What we need to start doing** ► a new idea or a concept that you have seen work before and would like to introduce in your institution.
- **What we need to stop doing** ► these are the activities that do not bring value.

HOW LONG IT TAKES

The activity takes up to 90 minutes, including the debrief session.

IDEAL GROUP SIZE

From 15 to 30.

Evaluation

We use a range of evaluation tools to measure participants' reactions, which allows us to make any necessary adjustments to our learning program and helps us design new learning activities.

During the event, we apply a variety of techniques to measure daily participants' satisfaction with the course as well as their impressions on acquiring new knowledge. The CEF event facilitator will lead on this type of evaluations at the end of each training day to obtain feedback when learning experience and impressions are still fresh in order to identify potential, otherwise unaddressed issues that are important to participants.

After each event, the following aspects of the learning events are measured:

- General impressions
- Usefulness of learning activity
- Possible application of newly acquired knowledge
- Learning design and delivery
- Logistics

Based on participants' responses to the survey at the end of each learning activity, the CEF event facilitator will prepare a **final evaluation report** and share it with you. Experts are asked to comment on the evaluation findings. Lessons learned at each learning activity are then incorporated into future learning programs.



EXAMPLE OF A METHOD FOR DAILY FEEDBACK COLLECTION: BENEFIT TREE

WHAT IT IS

This is a reflective method that captures thoughts and impressions of a particular training day through a pre-made visual form. As this activity is typically the last item on the agenda, it is important that it is done in a light-hearted way.

HOW IT WORKS

The apples on the tree represent unexpected benefits that made a particular day great, the leaves on the tree indicate the benefits that participants expected and received, and the leaves that have fallen off the tree relate to the benefits that they expected but did not get. We ask the participants to write down their answers on post-it notes in different colors before leaving the classroom for the day. Next morning, the training facilitators summarize the answers and give feedback on how they have incorporated the received comments into the agenda of the new day.

HOW LONG IT TAKES

The activity takes between 5 to 10 minutes.

IDEAL GROUP SIZE

Applicable to any group size.

About the CEF

We are a leading regional knowledge hub located in Ljubljana, Slovenia. Since 2001, the CEF supports capacity development for finance officials in South East Europe through learning. We combine topical expertise with in-depth knowledge of countries in the region in the thematic areas of public financial management, tax policy and administration, central banking, and cross-cutting areas of data and analysis for designing policies and leadership for managing reforms.

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