

# Sphere Training Package

## Part 1: Trainers' Guide / CD

### Use this to:

- ▶ gain an overview of the training workshops
- ▶ plan your workshops
- ▶ identify how to get the most from the materials
- ▶ review print-outs of the PowerPoints used



## The Sphere Project

Humanitarian Charter and Minimum Standards in Disaster Response



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## The Sphere Project

Humanitarian Charter and Minimum Standards in Disaster Response

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**The Sphere Project**

The Sphere Project is a programme of the Steering Committee for Humanitarian Response (SCHR) and InterAction with VOICE and ICVA. The project was launched in 1997 to develop a set of universal minimum standards in core areas of humanitarian assistance. The aim of the project is to improve the quality of assistance provided to people affected by disasters, and to enhance the accountability of the humanitarian system in disaster response. The Sphere Training Package is the product of the collective experience of many people and agencies. They should not therefore be seen as representing the views of any one agency.

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The Sphere handbook offers a tool for humanitarian agencies to enhance the effectiveness and quality of their responses and thus make a significant difference to the lives of people affected by disaster. In a high pressure and fast-changing environment, it is critical to have well-trained personnel ready to work effectively.

The Sphere Project Training Package is designed to help humanitarian agencies and their teams gain the knowledge and practical skills necessary to apply the Sphere handbook. This package draws on over four years' work from humanitarian training experts, and the experience and feedback of practitioners worldwide.

As awareness and use of the Sphere handbook continues to grow, it is more important than ever to have quality training in place to ensure that aid workers use the handbook consistently and effectively.

All the training is driven by a very practical goal, that by the end of a Sphere workshop:

► **participants will apply the handbook in their work within two weeks**

These comprehensive training materials are designed to be flexible to adapt to the diverse challenges and situations the humanitarian community has to deal with. However, they work towards one overriding aim, whatever the circumstances:

life with dignity for those affected by conflict or calamity.

The Sphere Project November 2003

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# Thank you

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Many trainers, practitioners, consultants and workshop participants helped to create and refine these materials. Without their talent, commitment and support none of this would exist.

Here we have only space to thank by name some of the many people who have made this Sphere Project Training Package a comprehensive and valuable resource.

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## A. GETTING STARTED

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Use this section to:

- ▶ review a map of the Sphere Project Training Package
- ▶ identify how to get the most from these training materials
- ▶ review an outline of the four training modules
- ▶ build a workshop agenda focusing on the specific needs of your participants
- ▶ identify key benefits of the training and core messages

### Getting the most from the Sphere Project Training Package

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Read this first

**Part 1  
Trainers'  
Guide**

**Use this to:**

- ▶ gain an overview of the training workshops
- ▶ plan your workshop
- ▶ identify how to get the most from the materials
- ▶ review print-outs of the PowerPoints used

**CD**

**Use this to:**

- ▶ read and adapt electronic versions of all the training materials
- ▶ print out training materials for your workshop
- ▶ access an electronic version of the handbook
- ▶ watch or show a nine-minute introductory video about Sphere

**Part 2  
Training  
Material**

including:

trainers' notes

handouts

background  
notes

optional toolkit  
exercises

**Module 1  
Introduction to Sphere**

2 x 90 minute sessions

**Use with participants new to Sphere**

Core content:

- ▶ **What is the Sphere project?**
- ▶ **Why is it important?**
- ▶ **How to use the Sphere handbook**

**Module 2  
The Humanitarian  
Charter in detail**

4 x 90 minute sessions

**Use with all humanitarian audiences**

Core content:

- ▶ **Main messages in the Humanitarian Charter**
- ▶ **Implications of the Humanitarian Charter**

**Module 3  
Sphere and the  
project cycle**

5 x 90 minute sessions  
1 x 180 minute session

**Use with audiences who assess, design  
and evaluate disaster response**

Core content:

- ▶ **How to apply the Sphere handbook in the disaster response project cycle**

**Module 4  
Sphere and disaster  
preparedness**

2 x 90 minute sessions

**Use with audiences who need an  
introduction to disaster preparedness**

Core content:

- ▶ **Basic concepts in disaster preparedness**
- ▶ **Disaster preparedness case study**

- ▶ **Training Of Trainers contacts**
- ▶ **more workshop exercises**

# How to use Part 1: Trainers' Guide

### This Trainers Guide helps you to:

- ▶ gain an overview of the training workshops
- ▶ plan your workshop
- ▶ identify how to get the most from the materials
- ▶ review print-outs of the PowerPoint slides used in the modules

### This guide is structured in five main sections

#### A. First, use GETTING STARTED

**This will help you understand:**

- ▶ the structure of the training modules
- ▶ how to get the most from the materials

#### B. Use PLANNING

**This will help you to:**

- ▶ identify key steps and actions to take at each stage of planning your workshop

#### C. Use TOOLS

**This will help you to:**

- ▶ identify the tools and templates available on the accompanying CD to organise and administer your workshop

#### D. Use MAXIMISING LEARNING

**This will help you to:**

- ▶ identify the best way for your participants to learn
- ▶ use best practice training tips and guidelines

#### E. Review POWERPOINTS

**This will help you to:**

- ▶ see the PowerPoints slides for each module

*You may want to refer to these images by keeping Part 1 Section E open at the PowerPoint slides alongside Part 2, as you work through the detailed trainers notes.*



## Using the CD



The CD accompanying this book is divided into nine main interlinked elements.

The materials on the CD are available in a variety of formats to give you flexibility in how you use them.

- |                   |   |
|-------------------|---|
| RTF files:        | ► <b>edit and adapt in Word, making it easy to change the training material to focus on the needs of your group</b> |
| PowerPoint files: | ► <b>adapt the presentations in each Module</b>   |
| PDF:              | ► <b>print complex documents easily and clearly</b>   |
| HTML:             | ► <b>navigate documents by keyword</b>  |
| MPEG:             | ► <b>watch video on screen, or show it using a PC projector</b>   |

## Interlinked Elements

<b>Home page</b>	With instructions on how to use the CD.
<b>About Sphere</b>	Will include the text "What is Sphere", plus the document "lessons learned", plus a few more items.
<b>Sphere Handbook 2004</b>	Read, print and search electronic version of the handbook.
<b>Training Modules</b>	Each module will have background note, trainer's notes, optional exercises, handouts, Power Point Slides. You can read, customise, print, search and also follow links with the handbook when it is referred to.
<b>Trainers' Guide</b>	Read, print and search electronic version of the trainers guide.
<b>Video:</b>	Watch or show the video
<b>Map of the CD</b>	Will allow you to have an overview of the contents of the CD.
<b>Search Engine</b>	Will allow you to search by keyword.
<b>WWW links</b>	If the user is connected to the internet they will be able to follow a list of relevant www links related to Sphere.

## How to use Part 2: Training Material

### Part 2 is divided into four training modules:

Module 1	<b>Introduction to Sphere</b>
Module 2	<b>The Humanitarian Charter</b>
Module 3	<b>Sphere and the project cycle</b>
Module 4	<b>Sphere and disaster preparedness</b>

For each module you will find trainers' notes, background notes and handouts for:

- ▶ **the core sessions**
- ▶ **optional toolkit exercises**

### Using the trainers' notes

(the step by step instructions to running the workshops)

The trainers' notes are not intended to be prescriptive, instead the materials are designed to be as flexible as possible. You will need to adapt the materials to the needs of your participants, and your own approach to training. The trainers' notes take you step by step through each activity, with broad guidelines on timings.

The Sphere training modules are designed to be used in a participatory way, to develop participants' existing knowledge and skills. Therefore, they combine presentations with more participative activities such as case studies, brainstorm and discussions.

Trainers' notes for a typical session look like this:

©Sphere Training Resources.

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Module 1: Trainers' notes

TRAINERS' NOTES

Session 1: What is Sphere and why is it important?

**Learning objectives**

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

- Discuss current trends or events that are impacting on our understanding of 'humanitarianism'.
- Describe why the Sphere Project is important.
- Describe the structure and process of the Sphere Project.
- Describe the basic structure of the Sphere handbook.
- Describe the difference between minimum standards, key indicators and guidance notes.

**Main messages**

- Politics, funding, competition, growing demand for resources, and our own past failures all influence the way organisations and individuals aim to develop professionalism in the humanitarian sector.
- The humanitarian context always remains an essential factor when planning humanitarian responses.
- There are hundreds of organisations and people who have contributed to the Sphere Project and the content of the Sphere handbook. The process is continuing and anyone is welcome to participate.
- The Sphere Project is a process, the output of which is the Sphere handbook.
- The Sphere handbook, when used intelligently, can contribute to improving the effectiveness of humanitarian organisations.
- There is logic to the structure of the handbook that makes it clear and easy to use.
- The Humanitarian Charter is a statement of values for humanitarian organisations, based on existing international legal instruments.

#### Using the handbook

All the training modules make extensive use of the Sphere handbook. Therefore it is very important that all the participants have access to a copy **before, during and after** the workshop.

It is also very important that you, the facilitator, are familiar with the structure and content of the handbook, preferably with the perspective of someone who applies it in their own work.

Ideally, the participants should work with the 2004 edition of the handbook. If you have the 2000 edition, you can still use these materials, as page references are given for both versions of the handbook.

- an effective monitoring and evaluation
- ⌚ Allow up to 2 minutes.

📺 Show slide What Sphere says about monitoring

See Sphere Handbook page 25/37

**Ask participants to:**

find the monitoring Minimum Standard

⌚ Allow 5 minutes.

**Briefly review the exercise against the learning**

The page number for the 2000 edition always comes first, followed by the page number for the 2004 edition

it means that the reference is on:  
page: 25 in the 2000 edition  
page: 37 in the 2004 edition

**The 2004 edition of the handbook has been significantly revised, taking into account recent technical developments and feedback from agencies using Sphere.**

#### The main additions in the 2004 edition are:

- ▶ a sixth sector, **food security** integrated with nutrition and food aid
- ▶ a new chapter outlining a number of standards common to all sectors including:  
**participation, assessment, response, targeting, monitoring, evaluation, and staff competencies and management**
- ▶ new emphasis on seven cross-cutting issues  
**children, older people, disabled people, gender, protection, HIV/AIDS and the environment**

There is no glossary in the 2004 edition, but many terms are defined in the text.

### Using the handouts

Electronic versions of all the training material are contained on the accompanying CD. Handouts for participants are contained in each module, just after the trainers' notes referring to them.

To make copies of handouts, either:

- ▶ **photocopy the relevant handout from Part 2: Training Material**
- ▶ **print the handout from the relevant module on the CD**

You can:

- ▶ **recognise handouts at a glance because they are labelled 'Handout' in the page header**
- ▶ **use the search engine on the CD to search for the handout by entering a keyword**

You can use the background notes in each module to:

- ▶ **become familiar with the core content and issues relating to this module before running it**
- ▶ **prepare participants for your workshop**
- ▶ **give to participants as a reference guide**

### Using the optional toolkit exercises

In addition to the material for the core sessions, each module contains optional toolkit exercises. These give you extra flexibility in:

- ▶ **targeting exercises to meet the specific needs of your group**
- ▶ **extending the length of your workshop**
- ▶ **putting emphasis on the areas that matter most for your learners**

Over time, additional optional toolkit exercises will be added to the website at **[www.sphereproject.org](http://www.sphereproject.org)** for you to download.

Detailed trainers' notes, background notes and handouts for each module are available in Part 2: Training Material

#### Module 1: Introduction to Sphere

Use with:

- ▶ **participants new to Sphere**

Enables participants to:

- ▶ **identify the structure and key content of the Sphere handbook**
- ▶ **explore the role of the Sphere handbook**
- ▶ **identify how the handbook can help in their work**
- ▶ **explore issues relating to using the handbook**

Core content:

- ▶ **what is the Sphere Project?**
- ▶ **why is it important?**
- ▶ **how to use the Sphere handbook**

Duration:

- ▶ **flexible - 30 minutes to 1 day**
  - ▷ 2 x 90 minute core sessions
  - ▷ 7 optional toolkit exercises
  - ▷ 30 minute executive briefing

#### Module 2: The Humanitarian Charter

Use with:

- ▶ **all humanitarian audiences, with no assumed knowledge of the Humanitarian Charter**

Enables participants to:

- ▶ **explore humanitarian issues**
- ▶ **identify the role of the Humanitarian Charter**
- ▶ **identify key content of the Humanitarian Charter**
- ▶ **consider the impact of the Humanitarian Charter on their work and performance**

Core content:

- ▶ **main messages in international law**
- ▶ **implications of international law and principles in disaster response**

Duration:

- ▶ **flexible - up to 2 days**
  - ▷ 4 x 90 minute core sessions
  - ▷ 15 optional toolkit exercises

### Overview of modules

#### Module 3: Sphere and the project cycle

Use with:

- ▶ audiences involved in project planning, implementation, evaluation or related fields

Enables participants to:

- ▶ identify the steps in the project cycle
- ▶ experience how to use the Sphere handbook to mitigate bias in assessment
- ▶ explore the purpose of assessment in disaster response
- ▶ use the Sphere handbook through each stage of the project cycle

Core content:

- ▶ How to apply the Sphere handbook in the disaster response project cycle

Duration:

- ▶ flexible - 2-3 days
  - ▷ 5 x 90 minute core sessions
  - ▷ 1 x 180 minute session
  - ▷ 7 optional toolkit exercises

#### Module 4: Sphere and disaster preparedness

Use with:

- ▶ audiences who need an introduction to disaster preparedness

Enables participants to:

- ▶ use key terms including disaster, hazard, risk, capacity and vulnerability
- ▶ gain a practical understanding of disaster preparedness, disaster prevention and disaster mitigation
- ▶ apply the Sphere handbook in disaster preparedness planning
- ▶ explore the impact of the Humanitarian Charter on disaster preparedness planning

Core content:

- ▶ Basic concepts in disaster preparedness
- ▶ Disaster preparedness case study

Duration:

- ▶ flexible - half day to 1 day
  - ▷ 2 x 90 minute core sessions
  - ▷ 8 optional toolkit exercises

**Training in Sphere benefits a wide range of stakeholders across the humanitarian community.**

<b>For multilateral organisations</b>	<ul style="list-style-type: none"> <li>▶ learn how to apply widely-accepted standards and indicators</li> <li>▶ gain practical insight into using tools for better coordination, reporting to multiple donors and working with national governments</li> </ul>
<b>For national NGOs</b>	<ul style="list-style-type: none"> <li>▶ gain awareness of Sphere as an organisational assessment tool</li> <li>▶ use Sphere to strengthen proposals and reporting</li> </ul>
<b>For emergency response teams</b>	<ul style="list-style-type: none"> <li>▶ learn how to apply the Sphere handbook in emergency situations</li> <li>▶ review operating procedures against the Sphere handbook to enhance emergency preparedness</li> </ul>
<b>For the local community</b>	<ul style="list-style-type: none"> <li>▶ gain an understanding of the Sphere standards in order to be able to participate on a more informed basis</li> </ul>
<b>For national governments</b>	<ul style="list-style-type: none"> <li>▶ identify best practice in coordinating the actions of diverse donors, multilaterals and NGOs within the country</li> </ul>
<b>For donor agencies</b>	<ul style="list-style-type: none"> <li>▶ identify benchmarks against which to review and compare proposals</li> <li>▶ learn how to appropriately use standards and indicators for monitoring and evaluation</li> </ul>

## Using a workshop

Workshops offer humanitarians key advantages. Workshops:

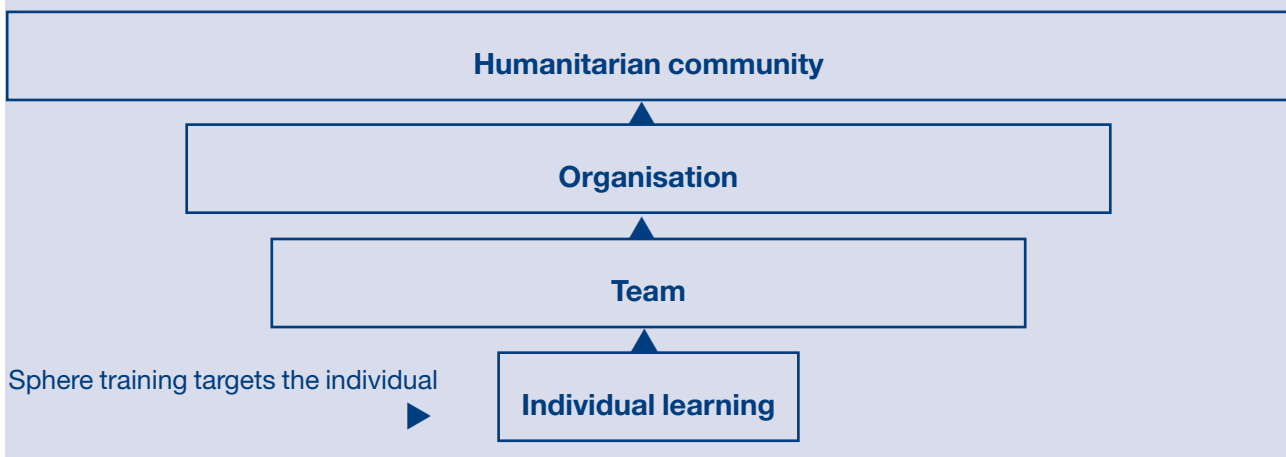
- ▶ **enable humanitarians to share stories, drawing on the oral culture of the humanitarian community**
- ▶ **bring together many humanitarians who may work in isolation from their peers and colleagues**
- ▶ **enable perspectives to be shared between distant departments of the same organisation, or between different organisations**
- ▶ **offer an opportunity for people to express and deal with the frustrations inherent in managing crises**
- ▶ **dedicate time for busy individuals to reflect on one issue only**
- ▶ **are cost effective compared with other forms of learning, such as one-on-one coaching**

## Focusing on the individual

This Sphere Training Package focuses on the needs of the individual, enabling them to apply the Sphere handbook through their work. In this way, they may influence the behaviours and actions of their team and organisation, and over time, the humanitarian sector as a whole.

The speed of this learning and change will be accelerated if teams and organisations:

- ▶ **encourage and support the individual participant**
- ▶ **enable the individual to reflect on what they have learnt and follow up on it**
- ▶ **provide a structured way for the individual to transfer what they have learnt at the workshop to apply it in their own work**



## Core messages

By taking part in workshops, participants will learn the following key messages, to help them apply the Sphere handbook effectively in their work.

- ▷ The disaster management cycle
  - ▶ **Objectives for disaster preparedness work – what an agency or a community would try to achieve if a disaster should occur**
  - ▶ **The Humanitarian Charter defines participation as essential for all stages of the disaster management cycle, and there are Minimum Standards and key indicators to help achieve participation**
  - ▶ **Depending on context, Sphere can assist in defining a starting point for reconstruction, rehabilitation and mitigation**
- ▷ The disaster response project cycle
  - ▶ **Objectives for disaster preparedness work – what an agency or a community would try to achieve if a disaster should occur**
  - ▶ **The Humanitarian Charter defines participation as essential for all stages of the disaster management cycle, and there are Minimum Standards and key indicators to help achieve participation**
  - ▶ **Depending on context, Sphere can assist in defining a starting point for reconstruction, rehabilitation and mitigation**



- ▷ The disaster response project cycle
  - ▶ **There are Minimum Standards, key indicators and guidance notes that help guide the processes for analysis (including assessments), programme planning, monitoring and evaluation**
  - ▶ **The key indicators can be questions to be asked or topics of information collection during assessments**
  - ▶ **The key indicators can be used as benchmarks for problem analysis after the assessment has occurred**
  - ▶ **When planning projects, the Sphere handbook can inform all levels of a logical project framework**
  - ▶ **The key indicators can be used for monitoring purposes**
  - ▶ **There are assessment checklists and monitoring tools provided in the handbook appendices**
- ▷ Management tool
  - ▶ **There are Minimum Standards, key indicators and guidance notes for human resource capacity and training that also outline competencies necessary for work in the technical sectors. The Sphere handbook can serve as part of a skills audit tool for humanitarian agencies, communities, and governments**
  - ▶ **The key indicators and guidance notes can be used by programme managers as a reference point against which to measure projects**
- ▷ Technical reference
  - ▶ **Providing a checklist to remind agencies of what needs to be addressed in emergencies, including specific issues that are not often given sufficient attention such as gender or age-specific interests**
- ▷ Policy and advocacy tool
  - ▶ **The Humanitarian Charter serves as a frame of reference for reflection on organisational vision and ethos. The Sphere handbook provides internationally accepted standards on which to base advocacy for resources and access and it helps non-programme staff with language for public communications and fundraising**
- ▷ Capacity building tool
  - ▶ **The Minimum Standards and key indicators can serve as objectives for an organisational strategy and criteria against which to measure the performance of an organisation**
- ▷ A tool to improve the effectiveness of disaster response by a group of agencies
  - ▶ **The Minimum Standards and key indicators serve as a basis for inter-agency assessments, a neutral agenda on which to base the planning of partnerships or serves as a common planning framework for joint projects or programmes**



## B. PLANNING

Use this section to:

- ▶ create a workshop agenda from the pool of materials available
- ▶ identify key steps and actions in planning
- ▶ review checklists for each stage

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The overall goal is that:

**“At the end of a Sphere training workshop participants will apply the handbook within their work within two weeks”**

The Sphere handbook is designed for a very practical purpose. In the same way, the outcomes of the training modules really matter in terms of their impact on performance. It is important to identify outcomes that are meaningful both to the target participants and the organisation as a whole. These outcomes will form the foundations for the measurements used when evaluating the programme.

### Targeting the needs of your participants

Each module gives you the opportunity:

- ▶ **to run at least two core 90 minutes sessions**
- ▶ **replace activities within the sessions with exercises from the optional toolkit**

You need to adapt module and session plans to meet the specific needs and expectations of your participants.

You need to establish their needs, for example:

- ▶ **use a pre-course questionnaire or the application form in the Tools section of the CD**
- ▶ **phone the participants or the organisation to explore their needs and objectives**

### Building your agenda

The Sphere training materials are designed to be as flexible as possible. The modular approach enables you to mix and match activities to target the participants' needs within the limits of the time and resources you have available. Each workshop is unique, and you can customise a specific agenda for your workshop using the "building blocks" provided in the form of 90 minute session plans and the optional exercises. The following agendas are **examples** of how you can adapt the workshop for different audiences and timescales.

## B. PLANNING

### Example agendas

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#### Half day agenda for a general introduction to all levels of staff

08.30 – 09.00	Mission statement ice breaker and workshop opening (see page [insert])
09.00 – 10.30	Module 1 session 1 – "What is the Sphere Project and why is it important?"
10.30 – 11.00	Coffee break
11.00 – 12.30	Module 1 session 2 – "How does the Sphere handbook work?"

#### Half day agenda as a refresher or follow up to a general introduction

08.30 – 09.00	Opening and review of application by participants since last workshop
09.00 – 10.30	Module 1 optional exercise – the Sphere challenge
10.30 – 11.00	Coffee break
11.00 – 12.30	Module 3 session 2 – Sphere and assessments

#### 1 day agenda for field-based project staff

08.30 – 09.00	Solo introductions and workshop opening
09.00 – 10.30	Module 1 session 1 – "What is the Sphere Project and why is it important?"
10.30 – 11.00	Coffee break
11.00 – 12.30	Module 1 session 2 – "How does the Sphere handbook work?"
12.30 – 13.30	Lunch
13.30 – 16.30	Module 3 Optional Toolkit exercise The field school
16.30 – 17.00	Workshop follow up and closure

#### 2 day agenda for introduction to the project cycle

<b>Day 1</b>	
08.30 – 09.00	Paired introductions and opening
09.00 – 10.30	Module 1 session 1
10.30 – 11.00	Coffee break
11.00 – 12.30	Module 1 session 2
12.30 – 14.00	Lunch
14.00 – 15.30	Module 3 session 1 – Context and the Project Cycle
15.30 – 16.00	Coffee break
16.00 – 17.30	Module 3 session 2 – Assessments
<b>Day 2</b>	
08.30 – 12.30	Module 3 session 3 - Analysis
12.30 – 14.00	Lunch
14.00 – 15.30	Module 3 session 4 - Planning
15.30 – 16.00	Coffee break
16.00 – 17.00	Parking lot, follow up and closure

## 3 day agenda with an emphasis on the Humanitarian Charter and analytical skills using the Sphere handbook

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### Day 1

08.30 – 09.00

**Humanitarian wish icebreaker and workshop opening**

09.00 – 10.30

**Module 1 session 1**

10.30 – 11.00

Coffee break

11.00 – 12.30

**Module 1 session 2**

12.30 – 14.00

Lunch

14.00 – 15.30

**Module 2 session 1**

15.30 – 16.00

Coffee break

16.00 – 17.30

**Module 2 session 2**

### Day 2

08.30 – 10.30

**Module 2 session 3**

10.30 – 11.00

Coffee break

11.00 – 12.30

**Module 2 session 4**

12.30 – 13.00

Lunch

13.00 – 17.00

**Module 2 optional exercise 11, 13, 14**

### Day 3

08.30 – 12.30

**Module 3 session 3, 4 and 5**

12.30 – 14.00

Lunch

14.00 – 15.30

**Module 3 session 6**

15.30 – 16.00

Coffee break

16.00 – 17.30

**Agency managers presentation, discussion of next steps, evaluation and closure**

## 3 day agenda for experienced project managers

### Day 1

08.30 – 0900

**Workshop opening**

09.00 – 1030

**Module 1 session 1**

10.30 – 1100

Coffee break

11.00 – 1230

**Module 1 session 2**

12.30 – 1400

Lunch

14.00 – 1530

**Module 2 session 1**

15.30 – 1600

Coffee break

16.00 – 1730

**Module 2 session 2**

### Day 2

08.30 – 1030

**Module 3 session 2**

10.30 – 1100

Coffee break

11.00 – 1230

**Module 2 session 3**

12.30 – 1400

Lunch

14.00 – 1530

**Module 2 session 4**

15.30 – 1600

Coffee break

16.00 – 1730

**Module 3 session 5**

### Day 3

08.30 – 1230

**Module 4 sessions 1&2**

12.30 – 1400

Lunch

14.00 – 1530

**Module 3 session 6**

15.30 – 1600

Coffee break

16.00 – 1730

**Agency managers presentation, discussion of next steps, evaluation and closure**

## B. PLANNING

### Suggested 3-day workshop agenda with a field visit component

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Time / Date	Monday	Tuesday	Wednesday	Thursday
<b>0830</b>		Recap and review	<b>Module 1:</b>	Recap and review
<b>0900 – 1030</b>		<b>Module 2: session 1</b> Main messages in the Humanitarian Charter	Optional Exercise 7 "the field school" continued	<b>Module 3: session 4</b> Monitoring and Evaluation
<b>1030 – 1100</b>		<b>Break</b>		<b>Break</b>
<b>1100 – 1230</b>		<b>Module 2: session 4</b> Implications in the Humanitarian Charter		Next steps, evaluation and closure
<b>1230 – 1400</b>	Participant arrival, registration, icebreakers and opening	<b>Lunch</b>	<b>Lunch</b>	
<b>1400 – 1530</b>	<b>Module 1: session 1</b> What is Sphere and why is it important?	<b>Module 2:</b> optional exercise 3 Humanitarian Principles and the individual	Group work and results determination	
<b>1530 – 1600</b>	<b>Break</b>	<b>Break</b>	<b>Break</b>	
<b>1600 – 1730</b>	<b>Module 1: session 2</b> How do I apply the Sphere handbook and what are the consequences if I do?	<b>Module 1:</b> Optional Exercise 6 "The field school"	Discussion and wrap-up from the field school	
<b>1730</b>	45 minute individual study assignment from Module 1: optional toolkit, exercise Sphere training challenge		Social evening	

## B. PLANNING

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### Identifying resources needed

#### Trainers

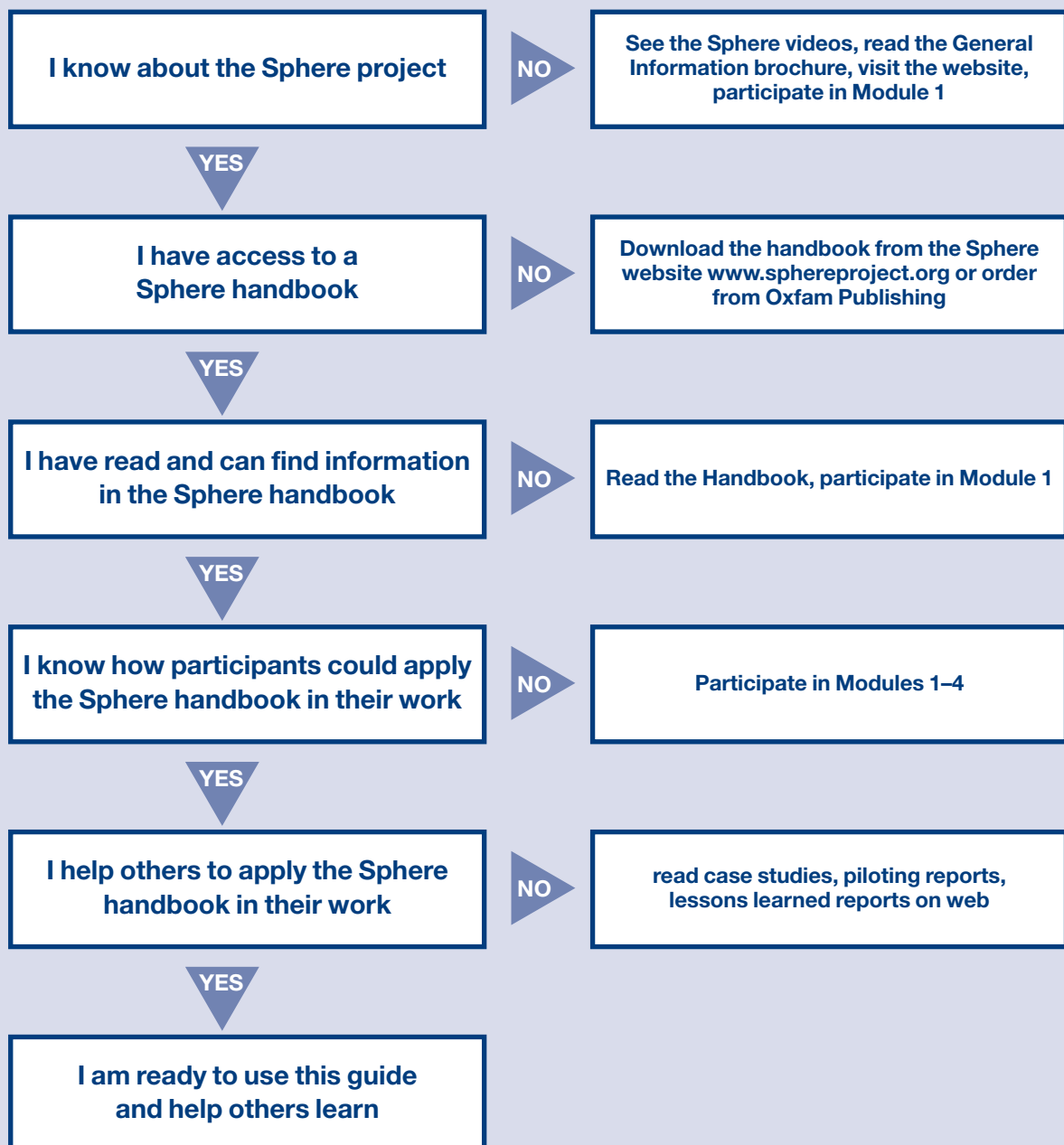
The Sphere training modules are intended for use by experienced trainers with facilitation skills who also have some technical experience/knowledge in disaster response programming and the humanitarian sector. However, a trainer with limited experience should also be able to use Module 1 by referring to the detailed notes in the Training Material and by working alongside a more experienced trainer.

The modules are designed to be run by two trainers.

A suggested option is to pair an experienced trainer with a content specialist.

#### Individual learning steps

This diagram explains that a trainer must thoroughly know the Sphere handbook before training others.





#### Participants

The number of participants for each workshop can vary between:

- ▶ **15 and 30.**

If you want more than 30 people to take part, you may find it difficult to run some of the exercises and meet the guideline times suggested for each module.

If you want fewer than 15 to take part, there will be difficulty in running the suggested case study and group work exercises.

#### Training methods

**To use the Sphere training modules effectively you need to be familiar with using the following types of training methodologies. Please see: Section D. MAXIMISING LEARNING in this Trainers' Guide for guidance on using these activities.**

#### Basic Training Tips

- ▶ **introductions**
- ▶ **energisers**
- ▶ **team work**
- ▶ **feedback**
- ▶ **reviewing and recap**
- ▶ **second language training**

#### Training Methods

- ▶ **case studies**
- ▶ **presentation/lecture**
- ▶ **brainstorming**
- ▶ **structured discussions**
- ▶ **questions and answers / elicitation**
- ▶ **ice breakers**

#### Key steps

##### Recruit the core team

Example

- ▶ The organiser **gets the process started, gains management support and the initial commitment from stakeholders**
- ▶ The training team **might consist of:**
- ▶ **facilitators, who have experience in helping groups learn in workshops**
- ▶ **content specialists, who have operational humanitarian experience or specific technical expertise**
- ▶ **trainers, who combine facilitation skills and content expertise**
- ▶ The administrator **organises the logistics and resources for the workshop. They support the workshop as it runs, and serve as the central contact point**
- ▶ The lead trainer **is the leader of the training team and is responsible for making the decisions during the course of a workshop**
- ▶ The commissioning agency **sometimes hosts the workshop, and is usually responsible for paying for it**
- ▶ The participants **are the ones who will have the opportunity to put learning into practice**

##### Agree roles and responsibilities

Example

- ▶ The host agency **supports the workshop by managing the logistics**
- ▶ The training team **implements the training professionally, and has a good knowledge of the content of the Sphere handbook and relevant training modules**
- ▶ Participants **contribute to, and learn from, the training, and share with others what they have learned**
- ▶ The impact of the training will be enhanced if everyone involved works towards the clear overall goal:
  - ▶ **participants will apply the Sphere handbook in their work within two weeks of the training**

#### Checklist

This checklist contains key activities when starting to plan a workshop.

☒ **Form a group to spread ownership of the idea**

- ☐ Form a small committee of people who are willing and able to help.
- ☐ Obtain tools and resources from the Sphere Project office or website such as: brochures, order forms for video, training modules, names of Training of Trainers course graduates in your organisation or region and recent 'Sphere in practice' examples.

☒ **Make key decisions**

- ☐ Agree a draft goal of the workshop with key stakeholders.
- ☐ Choose a date, preferably at least three months in advance.
- ☐ Agree budget and cost sharing arrangements.  
Make the following decisions:
  - ☐ Single agency or multiple agency? If multiple agencies, which ones?
  - ☐ Which agency or department will assume responsibility for the workshop?
  - ☐ Duration of training?
  - ☐ Residential training or non-residential training?
  - ☐ Will the venue be quiet and isolated, downtown and easy to get to, or in the office?  
The type of trainers you will use? Choice ranges from internal to your organisation, from a partner organisation, or external consultants. Consultants can be local, regional or international.
  - ☐ The number of participants?
  - ☐ The financial system, for example, full or partial subsidy, per diems or funded meals, participant fees?
  - ☐ Consider if any materials need to be translated, as this will take a lot of time and resources. Sphere training materials are available in French and Spanish at [www.sphereproject.org](http://www.sphereproject.org)

☒ **Obtain management support and funding**

- ☐ Research suitable venues and obtain quotations.
- ☐ Draft a budget.
- ☐ Present concept to management.
- ☐ Identify where funding will come from.
- ☐ Obtain support from management for the entire process from preparation to follow up.
- ☐ Identify who will be responsible for ensuring that support is given to the participants after the training occurs.
- ☐ Obtain necessary funding.

#### Checklist

- ☒ **Recruit a team**
  - ☐ Draw up roles and responsibilities for training team.
  - ☐ Recruit trainers.
  - ☐ Recruit the workshop administrator.
- ☒ **Publicise**
  - ☐ Confirm date, venue, goals, trainers, number of participants.
  - ☐ Confirm who will act as the communication and administration focal point and disseminate their contact details.
  - ☐ Advertise workshop, if necessary.
  - ☐ Recruit participants.
- ☒ **Delegate responsibility**
  - ☐ If you are the lead trainer, brief the training team and describe their roles and responsibilities.
  - ☐ Ensure that the training team knows who is responsible for supporting and following up with participants after the workshop is completed.

#### Key steps

##### Confirm progress so far

- ▶ Does the intended training focus on what the participants need and want to know?
- ▶ Are the objectives of the training clear?
- ▶ Is there support for these objectives from the organisations?
- ▶ Are the people, resources and processes in place to implement the workshop effectively?
- ▶ Is there a plan for following up with participants after the workshop?

##### Start designing the workshop, taking into account key factors

###### The stakeholder group

- ▶ Where, in the humanitarian community, do the target participants work?
- ▶ Is there more than one type of stakeholder in the workshop, for example, host government agencies, affected population, NGOs, INGOs, Red Cross / Red Crescent movement, donor agencies, UN agencies, militaries and the private sector?

###### Organisational values

- ▶ Within each stakeholder group what is the mandate or mission statement of the organisation?
- ▶ What is the organisation's size and way of working?

###### Position within the agency

- ▶ Where in the hierarchy of the agency do the participants work?
- ▶ Is there a technical (sector specific) or functional specialisation?

###### Culture and language of participants.

- ▶ What terms are used?
- ▶ How are people usually trained or taught in this culture?

###### Type of disaster

- ▶ What is the disaster being experienced?
- ▶ What sort of disaster does the agency usually respond to?

###### Context

- ▶ What is the context of the disaster?
- ▶ What is the context of the country where the workshop will occur?

###### Participant needs and expectations.

- ▶ What are participants' specific needs and expectations?
- ▶ What do the participants need to be able to do as a result of the workshops?
- ▶ What experience do the participants have?
- ▶ What motivates them as an individual to take part in the workshop?

#### Key steps cont

##### Target participants

- ▶ The training team and the hosting organisation need to agree and build a profile of the target participants for the workshop
- ▶ Once the team knows the type of participants it wants, a communication campaign to recruit these people can start to ensure that the target participants know that the training exists, and how to apply, or attend
- ▶ Forward application forms to potential participants, if appropriate
- ▶ Ask participants to return the forms within a time limit set by trainers
- ▶ Use the form to select participants for the workshop by identifying their organisation, role, experience, expectations and special needs for the workshop. This will also reveal learning needs of participants, and inform any adaptations to the agenda that trainers may wish to make

##### Draft objectives and agenda

To draft goals, consider what the participants will be interested in.

For example:

- ▶ Who are the participants, and what do they do?
- ▶ What sort of organisation do they work for?
- ▶ Do they work for multilateral institutions? These tend to be concerned with coordination, reporting to multiple donors, and working with national governments
- ▶ Do they work for donor agencies? These tend to be concerned with balancing accountability to the taxpayer and flexibility for the implementing partner
- ▶ Do they work for national governments? These tend to be concerned with the actions of the various donors, multilaterals and NGOs in their country, and how to ensure coordination, complementarity, and humanitarian work relevant to national standards and culture
- ▶ Do they work for national NGOs? These tend to be concerned with issues of capacity, or funding, so Sphere can be used as a training curriculum and organisational assessment tool for these agencies
- ▶ Do they work as part of an emergency response team? These may be concerned with reviewing their standard operating procedures against the Sphere handbook

##### Local communities

- ▶ Local communities contribute the most resources in the response, and will live with the results of the disaster response, rehabilitation and reconstruction efforts
- ▶ Sharing the Minimum Standards and key indicators used in a particular operation is an important part of accountability, although the quantitative indicators should be introduced with caution as they can be higher or lower than in the local community
- ▶ Where local communities and disaster response agencies are working to the same goals, the response is likely to be more efficient and effective

#### Checklist

☒ **Review critical issues**

- ☐ Order Sphere handbooks needed from Oxfam Publishing.
- ☐ Allow at least six weeks for delivery and follow the progress carefully.
- ☐ Target the participants well and maintain consistent communication with them before the workshop.
- ☐ Cultivate and maintain management support.
- ☐ Draft objectives and agenda to create interest and focus preparations, but remain flexible.

☒ **Target participants**

- ☐ Agree the ideal profile of target participants including language abilities, experience levels, position or function within their organisation, type of organisation.
- ☐ Prepare application form, include question on training needs.
- ☐ Prepare a short advertisement for the workshop, include goals, location, duration, trainers, target participants.
- ☐ Publicise the workshop, backed up by word of mouth, and distribute application forms in meetings and with newsletters.
- ☐ Brainstorm a list of individuals who might contribute to a high quality learning event. If necessary, personally recruit individuals.

☒ **Gain management support**

- ☐ Brief relevant managers of targeted participants to obtain nominations and support.
- ☐ Ask management to inform other relevant managers, or to make recruitment / invitation phone calls.
- ☐ Make a short presentation of the proposed training event.

#### Key steps

##### Clarify expectations

- ▶ Use the application form in the Tools section of the CD to gather participants' needs and expectations
- ▶ Review these forms and establish a picture of the training needs of the participants
- ▶ If necessary, follow up with an additional questionnaire to participants or phone call

##### Set the workshop agenda

- ▶ Set the agenda by selecting the appropriate session plans, activities and optional toolkit exercises from the Sphere training modules
- ▶ The training team meets to talk through the agenda, and assign clear responsibilities for each of the sessions prior to the workshop

##### Administrative preparations

- ▶ Try to get the best venue by booking as early as possible
- ▶ Compare several possible venues before making a final decision
- ▶ Act as a central contact point to ensure clarity of instructions
- ▶ Finalise contracts for trainers, venue, and suppliers
- ▶ Finalise participant list, contact details and travel schedules
- ▶ Review agenda to identify specific preparation and resource needs



## Checklist

- ☒ **Select participants**
  - ☐ Review applications.
  - ☐ Make approval based on:
    - ▶ draft goals of workshop
    - ▶ targeted participant profile
    - ▶ clear management support of the individual's application, where applicable.
  - ☐ Send out letters confirming participation and date of workshop
- ☒ **Set objectives and final agenda**
  - ☐ Based on participant application forms and goals, agree objectives.
  - ☐ Finalise agenda.
  - ☐ Circulate agenda to participants.
  - ☐ Assign responsibilities in the team for various sections of the agenda.
  - ☐ Write up roles and responsibilities for additional people supporting the workshop.
  - ☐ Recruit additional support or content specialists, if needed.
- ☒ **Prepare administration**
  - ☐ If possible, inspect the venue or talk about your needs over the phone. Check that the main training room is big and flexible enough.  
Also take into account: small committee rooms; break and meal facilities; experience and flexibility of venue staff; ease of transport to and from venue; office support facilities.
  - ☐ Negotiate the contract with the venue. Include training rooms, equipment, the type of refreshment available at breaks, break times, type of meals, meal times, refreshment available in training rooms.
  - ☐ If a residential workshop, agree with venue on number of rooms and payment mechanisms.
  - ☐ Contact hotel when possible with a confirmation of number of rooms, participant list, detailed programme.
  - ☐ Create a list of useful contact names and numbers
  - ☐ Contact people who will help and send a list of their roles and responsibilities.
  - ☐ Organise travel schedules, and if necessary support visa requirements of each participant.
  - ☐ Remember that some visas taken much longer than others.
  - ☐ Organise transport if required for participants to and from the venue.
  - ☐ Confirm trainer travel schedules and accommodation.
  - ☐ If budget allows organise additional side activities or special events and social activities for participants
  - ☐ Obtain necessary equipment and resources.
  - ☐ Plan for the number of handouts that will be used and the type of participant workbook.

#### Key steps

##### Send logistics information to participants

- ▶ Send out detailed instructions to help ensure that the participants get to the right place at the right time with the right clothing and equipment, and have completed the necessary preparatory work
- ▶ In particular, ensure that participants have a Sphere handbook and read it before arrival

##### Prepare finance and administration

- ▶ Review the budget.
- ▶ Establish procedures so that:
  - ▷ contracts can be paid for
  - ▷ cash is available for purchasing supplies
  - ▷ where appropriate, fees can be collected from participants
  - ▷ a ledger is established to enable fast and accurate financial accounting after the workshop

##### Plan time for trainer preparation

- ▶ As a guideline, when using the Sphere training materials for the first time, allow two hours of trainer preparation time for every hour of training time
  - ▷ For example, if a trainer was to run a project cycle workshop over a day consisting of six hours of training time, that trainer would need to study the project cycle module for 12 hours before the workshop
- ▶ If new materials are to be written to complement the Sphere Project training materials, preparation time can increase significantly. The trainer does not have to be an expert in the content of the workshop, but must know the training materials thoroughly

## Checklist

- ☒ **Send participants final instructions, including the following.**
  - ☐ Title of workshop, date, arrival/registration/departure times
  - ☐ Aims and objectives of workshop
  - ☐ Outline of the agenda with daily start and finish times
  - ☐ Venue location, map, facilities available and contact details
  - ☐ Travel arrangements and details
  - ☐ Checklist about what to prepare and bring (clothing, personal stationary, preparatory reading or work)
  - ☐ Expenses or per diem arrangements
  - ☐ Information about fees or costs
  - ☐ If workshop is residential, information about accommodation and meal arrangements
  - ☐ If necessary also include a copy of the Sphere handbook. Send this early as all other material can be emailed
- ☒ **Finance and administration**
  - ☐ Review budget
  - ☐ Confirm cost sharing arrangements specifying who will pay what
  - ☐ Review contracts, invoicing procedures and terms of payments
  - ☐ Review procedure for accounting and cash disbursements
  - ☐ Confirm with venue number of participants, and the billing arrangements
  - ☐ Confirm payment methods: bills, cash, cheque, credit card
  - ☐ Prepare a resource agenda that details room and equipment needs for each block of time

**Checklist**

- ☒ **Participants and training team**
  - ☐ Make reminder phone call to participants and resource people
  - ☐ Confirm travel arrangements to the venue
  - ☐ Confirm travel and accommodation arrangements for training team
- ☒ **Confirm equipment**
  - ☐ Video, TV
  - ☐ Overhead projector, spare bulb
  - ☐ Computer, projector, connectors and cabling, screen
  - ☐ Correct power plug or adapters if necessary, check voltage.
- ☒ **Stationery**
  - ☐ Flipchart stands
  - ☐ Flipchart paper plus markers in various colours
  - ☐ Spare pens, and pads of paper
  - ☐ Coloured cards
  - ☐ Scotch tape, blue tack, post-it notes
  - ☐ Hole punch, stapler, scissors
  - ☐ If overhead projector is used – transparencies and pens
- ☒ **Facilities**
  - ☐ Chairs for all participants
  - ☐ One table per group plus extra tables for resource materials
  - ☐ Lunches and coffee/tea breaks confirmed with catering
  - ☐ Room lighting
  - ☐ Room temperature
  - ☐ Toilet facilities and supplies
  - ☐ Drinking water and glasses
  - ☐ Group work rooms
  - ☐ Coffee break area
  - ☐ If a long workshop, establish office facilities
- ☒ **Training materials for participants**
  - ☐ Agenda and welcome letter
  - ☐ Instructions and orientation for the venue
  - ☐ Emergency numbers
  - ☐ Financial reminders
  - ☐ Name tags
  - ☐ Participant workbooks
  - ☐ Extra Sphere handbooks
  - ☐ Photocopied handouts

## B. PLANNING

### One week before the workshop

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#### Checklist

- ☒ **Materials for the training team**
  - ☐ Session plans.
  - ☐ Resource materials.
  - ☐ Optional toolkits (ice breakers, side activities).
  - ☐ Evaluation forms.
  - ☐ System for typing up the proceedings of important discussions.
- ☒ **Special**
  - ☐ List of contact details for participants and trainers.
  - ☐ Group photograph.
  - ☐ Side activities, or extra curricular events, or field trips.
  - ☐ Adequate internet access for participants if a residential workshop.
  - ☐ Graduation certificate.

#### Key steps

##### Check the venue and room

- ▶ Visit the venue before training to check accessibility, size and number of rooms available. Identify and prepare for potential sources of distraction and discomfort, for example light, temperature, sound, ventilation
- ▶ Identify and prepare for potential difficulties with equipment, for example access to power, the quality and position of overhead projectors and videos
- ▶ Ideally you need a main room with the following characteristics:
  - ▷ large enough to hold all the participants
  - ▷ participants have a good view of a central presentation area and of each other
  - ▷ flexible seating
  - ▷ option for at least two additional break-out rooms for smaller team work

##### Arrange seats

- ▶ Arrange seats so that all participants have an easy view of the equipment and of the other participants
- ▶ For work in small groups, arrange seats to minimise distraction and the need to keep moving the seats
- ▶ Recognise that the comfort of chairs will directly affect the attention span and the enjoyment of participants, particularly if the workshop is long. Participants may also need to write notes, so tables or clipboards should be provided

##### Build time sessions around participants' concentration

- ▶ Carefully time sessions to take advantage of when people can best pay attention and concentrate. Mornings tend to be better for concentration on theory, whilst the afternoon often requires more active exercises
- ▶ Set the start and close times of the workshop according to participants' needs - for example, distance and ease to travel to the workshop; child care; work demands and security

#### Key steps

##### Plan the pace and content of sessions

- ▶ When designing a workshop, take into account the amount of content that can be absorbed by people and the need for changes in pace to retain concentration and interest
- ▶ Do not overestimate what can be absorbed and underestimate how long it takes
- ▶ Build in time for reinforcement and repetition of key learning points, as well as checking participants' learning

##### Use country-specific resources

- ▶ Wherever possible, try to adapt the training materials to suit your local context
- ▶ Use specific examples from the region during the presentations and relate case study exercises to the local situation
- ▶ Take care to avoid raising local sensitivities, for example avoid naming actual individuals, organisations or political and religious authorities
- ▶ Leave sufficient preparation time when requesting country-specific case studies, so that you can adapt information to a suitable training format

##### Create a safe learning environment

- ▶ Recognise that participants are likely to feel a number of different anxieties at the beginning of a workshop, for example:
  - ▷ where participants start at different levels of knowledge about Sphere and/or the humanitarian world in general at the beginning of a workshop
  - ▷ where there is a mix of cultures within the groups
- ▶ Aim from the start to establish a safe environment where no one will feel afraid to ask questions or make mistakes

##### Set objectives

- ▶ Make the objectives clear for each activity and session, as people tend to learn more effectively if they know why they are doing something

##### Get to know the participants

- ▶ Get to know the participants, and become familiar with their background and experiences
- ▶ Learn and use their names, and take every opportunity to talk to them about what they want from the workshop
- ▶ Understand and respect participants' special needs, particularly in relation to culture, religion and gender

#### Checklist

☒ **Day before**

- ☐ Organise briefing meetings for trainers when they arrive at the workshop location
- Check the following:
  - ☐ Main training room, and committee rooms are available
  - ☐ Rooms for seating, lighting, temperature, drinking water
  - ☐ Toilet facilities and supplies
  - ☐ Equipment is functioning, and confirm technical support in case of breakdown
  - ☐ Security and safety systems and procedures at venue
  - ☐ Emergency telephone numbers and contact details
  - ☐ Training materials are photocopied and stationery is present

☒ **First day**

- ☐ Reception of participants
- ☐ Confirmation of payments and responsibilities
- ☐ Registration and distribution of materials
- ☐ Confirm return air tickets or travel arrangements
- ☐ Training rooms opening in sufficient time for preparations

☒ **Last day**

- Check the following:
  - ☐ Evaluation forms
  - ☐ Photograph
  - ☐ Certificate
  - ☐ Contact details
  - ☐ Next steps

☒ **After the workshop (for trainers and host organisations)**

- ☐ Immediately (within 24 hours of completion) run 'lessons learned' debriefing
- ☐ Thank you letter for resource people and organisations
- ☐ Pay invoices, collect receipts, file finance reports
- ☐ Produce workshop report and disseminate to participants
- ☐ Modify training materials, if appropriate
- ☐ Identify how to improve your practice the next time



There have been Sphere workshops in many different countries. A consistent lesson learned is that the training has more impact on the ground if it is followed up. While participants may leave the workshop motivated to put the Sphere handbook into action, this is much harder when faced with the day to day challenges of work. Follow up activities can help the individual participant to build Sphere into their own routine, and that of the organisation.

#### Key steps (for organisations and trainers)

- ▶ Evaluate (see the C. Tools Section, Evaluation forms)

##### Make individual contact

- ▶ Keep in touch with individual participants
- ▶ Call or email to see how things are going, and how the participant is applying what they have learned

##### Check the goal

- ▶ Check to see if the individual has achieved the overall goal of Sphere training:
  - ▷ did they apply the handbook in their work within two weeks?

##### Check the longer term impact

- ▶ Consider contacting participants a number of months after they took part in the workshop, for example after two or six months
  - ▷ you may want to use the 'Post-workshop follow up questionnaire' (this is in the Tools section of the CD)
- ▶ Seek to gain feedback on how they are using the Sphere handbook in their work
- ▶ For a more complete picture of the ongoing impact of the workshop you may want to use some of the following tools:
  - ▷ telephone or email surveys
  - ▷ focus groups
  - ▷ performance records
  - ▷ management or peer feedback
  - ▷ quizzes

##### Follow up workshops

- ▶ Try to identify an organisation or network to host an additional half day workshop
- ▶ Plan ahead to give participants a target by which to review work done
- ▶ Use part of the workshop to look at what people are currently doing with the Sphere handbook, what has worked well, what they have found challenging and what they are aiming for now

##### The field school

- ▶ Visit a real project and apply the Sphere handbook to it
- ▶ For more guidance on how to run the field school, see: Optional Toolkit: Exercise 6 'The field school' in Part 2: Training Material, Module 1



## C TOOLS

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### Use this section to:

- ▶ gain an overview of tools, templates, forms and letters available on the CD to enable you to plan and organise your workshop
- ▶ identify core resources available online from [www.sphereproject.org](http://www.sphereproject.org)
- ▶ review further sources of support available from the wider humanitarian community

<b>Tools on the CD</b>	<b>44</b>
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<b>Materials available</b>	<b>58</b>
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<b>Further support</b>	<b>58</b>
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You can use the following documents contained on the CD accompanying this book:

- ▶ **Sphere Project order form**
- ▶ **Example invitation letter**
- ▶ **Application form**
- ▶ **Example confirmation letter**
- ▶ **Registration form**
- ▶ **Participant evaluation form**
- ▶ **Trainer evaluation form**
- ▶ **Post workshop follow up questionnaire**
- ▶ **Suggested format for sharing learning**

To use the tools on the CD:

- ▶ **go to the documents section**
- ▶ **open the document you want to use**

SECTION	Use
<b>Sphere Project order form</b>	▶ order Sphere handbook and video
<b>Example invitation letter</b>	▶ adapt and send to organisations to invite them to attend a workshop
<b>Application form</b>	<ul style="list-style-type: none"> <li>▶ invite individuals to the workshop</li> <li>▶ capture key information, including their experience and expectations</li> </ul>
<b>Example confirmation letter</b>	<ul style="list-style-type: none"> <li>▶ send individuals confirmation of the workshop</li> <li>▶ send guidelines on what they need to do before the workshop</li> </ul>
<b>Registration form</b>	▶ create an overview of all the people attending and their contact details
<b>Participant evaluation form</b>	▶ hand out at the end of a workshop to gather feedback from each participant
<b>Trainer evaluation form</b>	<ul style="list-style-type: none"> <li>▶ give to the training team to evaluate the workshop for their own organisation</li> <li>▶ gain an overview of trainer and participant feedback               <ul style="list-style-type: none"> <li>▷ if appropriate, forward a copy to Sphere</li> </ul> </li> </ul>
<b>Post workshop follow up questionnaire</b>	<ul style="list-style-type: none"> <li>▶ send this to the participants two weeks – two months after the workshop</li> <li>▶ gather participants' feedback after they have time to reflect on how they apply Sphere in their work</li> </ul>
<b>Suggested format for sharing learning</b>	<ul style="list-style-type: none"> <li>▶ use this to send examples of case studies of Sphere in action through to Sphere</li> <li>▶ use this to send a brief report on the training to Sphere</li> </ul>

# The Sphere Handbook

## Humanitarian Charter and Minimum Standards in Disaster Response 2004 edition

Following the enthusiastic response to the first edition of The Sphere Handbook, this revised edition is the result of feedback from current users, worldwide consultation with practitioners, and from training workshops.

It features revisions from focal groups of representatives from national and international NGOs, the Red Cross & Red Crescent movement, UN agencies, academic institutions and donor and government ministries. Key changes include:

- addition of an entirely new section on food security (incorporated with nutrition and food aid)
- incorporation of cross-cutting issues of gender, children, elderly, disabled, environment, HIV/AIDS, and protection
- updated and refined qualitative and quantitative indicators
- expanded introduction
- development of common process standards
- clearer cross-referencing and more concise, user-friendly text

The 2004 edition is in the same handy A5 format and structure, with a free CD-ROM featuring the full searchable text.

Published by The Sphere Project

A5, 5<sup>3</sup>/<sub>4</sub>"x8<sup>1</sup>/<sub>2</sub>", paperback, 330pp + CD-ROM • £11.95 / US\$19.00  
0 85598 510 0 • November 2003 • English-language version

0 85598 511 9 • February 2004  
French-language version

0 85598 512 7 • February 2004  
Spanish-language version

0 85598 521 6 • April 2004  
\*Russian-language version

\*Arabic-language version: contact Sphere Project for details  
April 2004

Also available  
Sphere Handbook 2000 Edition • Portuguese-language version  
0 85598 462 7 • £10.95 / US\$17.95

\*CD-ROM pending



For more information on  
The Sphere Project, visit  
[www.sphereproject.org](http://www.sphereproject.org)

Special discounts available for bulk orders from  
humanitarian, non-profit organisations.

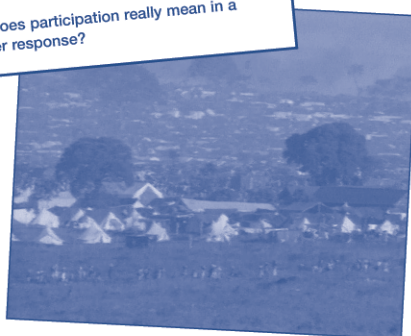
Contact The Sphere Project, email  
[info@sphereproject.org](mailto:info@sphereproject.org) or Oxfam Publishing,  
[publish@oxfam.org.uk](mailto:publish@oxfam.org.uk) for more details.

## The Sphere Project: An Introduction to Humanitarian Challenges

This specially filmed full-colour footage from Sierra Leone and other locations introduces the Sphere principles and practices in a real field situation. It forms an ideal orientation package for humanitarian and development aid workers.

Through testimonies from experienced practitioners and real-life examples of the use of the Sphere Handbook, the film explores broader themes such as:

- What is the history of humanitarian action?
- What is the humanitarian identity?
- What role do legal instruments play in disaster response?
- How does one move from principles to action?
- What does participation really mean in a disaster response?



The Sphere Project

An Introduction  
to Humanitarian  
Challenges



Published by The Sphere Project

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French and Spanish  
£9.95 + VAT (£11.70) / US\$16.50

NB Charges for video/DVD cover the cost of  
duplication and packaging. All DVDs are  
multi-zone.

## Order form

Quantity	Title	Stock code	£ Price	US\$ Price	Total
	The Sphere Project Handbook, 2e - English	55101	£11.95	\$19.00	
	The Sphere Project Handbook, 2e - French	55110	£11.95	\$19.00	
	The Sphere Project Handbook, 2e - Russian	55217	£11.95	\$19.00	
	The Sphere Project Handbook, 2e - Spanish	55128	£11.95	\$19.00	
	The Sphere Project Handbook, 1e - Portuguese	54628	£10.95	\$17.95	
	The Sphere Project Training Package	55098	£30.00	\$48.00	
The Sphere Project: An Introduction to Humanitarian Challenges (film)					
	DVD - PAL version English, French, and Spanish	55160	£9.95 + VAT (£11.70)	\$16.50	
	DVD - NTSC version English, French, and Spanish	55080	£9.95 + VAT (£11.70)	\$16.50	
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	Video PAL - Spanish	55195	£9.95 + VAT (£11.70)	\$16.50	
	Video NTSC - English	55063	£9.95 + VAT (£11.70)	\$16.50	
	Video NTSC - French	55187	£9.95 + VAT (£11.70)	\$16.50	
	Video NTSC - Spanish	55209	£9.95 + VAT (£11.70)	\$16.50	
Special discounts available for bulk orders from humanitarian, non-profit organisations.					<b>Subtotal</b>
Contact The Sphere Project, email <a href="mailto:info@sphereproject.org">info@sphereproject.org</a> or Oxfam Publishing, email <a href="mailto:publish@oxfam.org.uk">publish@oxfam.org.uk</a> for more details.					<b>Postage and packing</b>
					<b>Total amount due</b>

### POSTAGE AND PACKING CHARGES

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## Example invitation letter

Your Agency Letterhead

To: The Agency Director

Subject: Sphere Humanitarian Charter and Minimum Standards in Disaster Response

Dear [Name],

I would like to invite your organisation to participate to a 'Sphere Project Workshop' on Standards for Disaster Response, that we are hosting on [Date] in [Venue]

You may have already heard of the Sphere Project (if not, please find enclosed a small information brochure). The Project is funded by a dozen governments and managed by four major NGO networks, the Steering Committee for Humanitarian Response, InterAction, International Council of Voluntary Agencies and VOICE. It aims to increase the effectiveness of humanitarian assistance, and to support humanitarian agencies in becoming more accountable.

The Sphere Humanitarian Charter and Minimum Standards were first published in October 1998. Since then, there has been an edition in 2000 and 2004. All these editions have involved thousands of people and hundreds of organisations around the world. Today, the Sphere Project handbook represents the result of more than seven years of inter-agency collaboration.

The production of the Sphere handbook is a significant achievement and an ongoing process. The challenge is putting policy into action. The workshop we are sponsoring is designed to involve local humanitarian agencies in this process and to explore with staff how to apply the standards and improve the quality of life of people affected by disasters.

We will host two events:

A two-hour Head of Agency meeting on standards for disaster response on [date], which I would like you to attend.

A three-day training workshop aimed at national level operational managers, responsible for agencies' emergency or disaster response work.

The workshop will take place on [date].

I invite you to nominate one person from your agency to attend and to learn about the practical application of standards in field-work. Following the workshop your participant might also be able to train other staff from your agency.

The workshop will be led by [trainer's name] training expert with relevant field experience.

Both the events have been modelled on workshops that have occurred around the world and have been built upon the lessons of the Sphere Project.

I trust you will agree with me that this is an important initiative. I would be grateful if you could confirm your participation and hand the registration form to the person you would like to designate for the workshop. The workshop is entirely free but is open to a select number of participants.

Thank you for your interest and we look forward to a rewarding workshop.

Sincerely,

The Host Agency Director

## Application form

Workshop Title:	Dates and times:
Venue	Trainers:
Return address	Please complete this application form and send it to the return address by (date)___.
Name:	Role:
Your technical expertise:	
Tel:	Fax:
Email:	
Briefly describe your experience of working in disaster response programmes.	
What do you expect to gain from the workshop?	
Do you have any special needs? (For example, dietary; access; timing):	
Your signature:	

A copy of the workshop goal is attached.

## Example confirmation letter

Your Agency Letterhead

Date:

To: Nominated participants

CC: Agency director

Subject: Sphere Training on the Humanitarian Charter and Minimum Standards for Disaster Response

Dear [Name],

Thank you for agreeing to take part in workshop. I think you will find the time well spent for several reasons:

- it gives us all an opportunity to understand what is happening elsewhere in the world with respect to disaster response effectiveness
- it provides an opportunity for you to share experiences with peers in other agencies
- I believe that you will find the Sphere handbook a useful tool and this workshop should help you begin to use it in your work.

Please find with this letter material to read before the workshop, and a copy of the latest edition of the Sphere Project handbook, as a contribution by my organisation to the disaster response and humanitarian community here in XXX.

Please ensure that you have read at least the Introduction/What is Sphere?, the Humanitarian Charter and familiarise yourself with the structure of Sphere handbook before you arrive.

A reminder that the venue is XXX, and the programme is also attached. The workshop is free and lunch will be provided. Participants are responsible for their own transport and accommodation costs, if necessary.

Thank you once again, and I look forward to an interesting workshop.

Host agency director

## Registration form

Workshop Title:					
Dates:					
Trainers:			Venue:		
Name	Role/Job	Organisation	Tel. / Fax #	Email	Address
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

## Participant evaluation form

Workshop Title:		Date:																																																															
Trainers:		Location:																																																															
<p>Please complete and return this form to the trainers at the end of the workshop. Your frank evaluation is greatly appreciated.</p> <p>Please rate the following categories on a scale of 1 – 5, where 1 = poor and 5 = excellent</p> <table border="1"> <thead> <tr> <th></th> <th>1</th> <th>2</th> <th>3</th> <th>4</th> <th>5</th> </tr> </thead> <tbody> <tr> <td>Achievement of workshop aims and objectives</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Relevance of content to your work</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Impact on the way you work</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Pace and balance of the workshop</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Quality of the learning materials and aids</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Facilitation and presentation of the training</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Quality of pre-training information</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Quality of the venue and accommodation</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>What parts of the workshop were most useful for you?</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>							1	2	3	4	5	Achievement of workshop aims and objectives						Relevance of content to your work						Impact on the way you work						Pace and balance of the workshop						Quality of the learning materials and aids						Facilitation and presentation of the training						Quality of pre-training information						Quality of the venue and accommodation						What parts of the workshop were most useful for you?					
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Quality of the venue and accommodation																																																																	
What parts of the workshop were most useful for you?																																																																	
<p>What improvements/changes would you suggest for another workshop?</p>																																																																	
<p>How will you use the Sphere handbook in your work?</p>																																																																	
<p>Please give any other comments/suggestions.</p>																																																																	

If you would like more information on Sphere or have suggestions or comments on the handbook or project approach, please complete the attached Sphere Handbook Feedback Form – we value your contribution.  
Thank you for taking the time to fill in this form.  
[Sphere handbook feedback form to come]

## Trainer evaluation form

### Part A - Workshop report

For the host agency of the workshop and if desired, copied in as an information copy to the Sphere Project Office along with the Training Report below.

**Context:** Brief summary of the context for the workshop. For example: country profile; types of vulnerabilities and capacities; profile of the humanitarian actors in the country. Or profile of the participants and their organisations if this workshop is occurring at a regional or headquarter level.

**The facts:** Brief summary of content covered in the workshop.

**Key points from participant discussions:** Key relevant points from participant discussions, in particular relating to using the Humanitarian Charter and Minimum Standards.

**Observations by trainers:** Main learning points from workshop, for example: opportunities or concerns relating to Sphere in the country or organisations.

**Optional information:** For example, people who might be carrying the process on in the future

## Trainer evaluation form

### Part B – Training Report (For your monitoring purposes)

Title of workshop and modules covered:	Length of workshop:
Dates:	Location:
Trainers:	

Summary of participant evaluation forms  
Circle the average responses from Participant Evaluation Forms on a scale of 1 – 5, where 1 = poor and 5 = excellent

	1	2	3	4	5
Achievement of workshop aims and objectives					
Relevance of content to your work					
Impact on the way you work					
Pace and balance of the workshop					
Quality of the learning materials and aids					
Facilitation and presentation of the training					
Quality of pre-training information					
Quality of the venue and accommodation					

**Administrative process.**  
Lessons learned on the administration of the event, management and logistical matters of relevance to other trainers.

**How the workshop was run.**  
What the agenda was, which parts of the Sphere training modules you ran. Lessons learned on the structure of the workshop and results achieved.

**What worked well? Please explain why.**

**What could be changed or improved?**

**Did the workshop help people to understand and use the Sphere Handbook? Please explain.**

## Post-workshop follow up questionnaire

Workshop follow-up questionnaire

Your name, position, organisation, today's date:

Date and location of Sphere workshop that you attended:

Workshop trainers:

Workshop host agency:

What was the thing that you remember the most about the workshop?

Have you used the Sphere handbook since the workshop? Please circle Yes / No

Please explain how.

Are you glad that you attended the workshop? Please circle Yes / No

Please describe why.

Has Sphere been used or discussed in your organisation since? Please circle Yes / No.

If yes, how?

What, if any, additional help is needed to support a local process?

Other comments or suggestions are most welcome!



## Suggested format for sharing learning

### A - Case study format

The Project Secretariat would greatly appreciate case studies from the practical use of the Sphere handbook. This information might be posted on our website, disseminated to "pilot country" initiatives, and published in a book of case studies. Send to the Sphere Project Manager by email: [info@sphereproject.org](mailto:info@sphereproject.org)

Instructions

1. Obtain through direct experience (preferably by running a "field school")
2. Alternatively obtain through telephone interviews with someone who has applied the Sphere handbook
3. Maximum length 2-3 paragraphs
4. Should be short enough so someone could read it in less than 5 minutes
5. Should contain 1-2 main lessons









Contents

Brief description of how the Sphere handbook was applied in your organisation or by partners.  
Explain what was learned when the handbook was used.

### B - Training report

Please help the Sphere Project Secretariat. We want to know when you deliver some sort of learning event that uses the Sphere Training Modules. Send a short (eight lines only) email with the following information. Send your training report to: [info@sphereproject.org](mailto:info@sphereproject.org)




1. Date:
2. Location:
3. Number of participants:
4. Profile of participants:  
(field/hq; single agency/interagency; technical/project/program/policy/senior managers)
5. Profile of organisations represented: (INGO, LNGO, Govt, Donor, Academic, community CBO, UN)
6. Host agency: (agency name)
7. Facilitators: (names)
8. Content and duration: (which module, and number of days)

	Use	Available from: Sphere	Order from: Oxfam
<b>The Sphere handbook</b> The central resource for the Sphere project, including the Humanitarian Charter, Minimum Standards, key indicators and guidance notes	<ul style="list-style-type: none"> <li>▶ navigate html version</li> <li>▶ download rtf and pdf versions of the handbook in French, Spanish and English</li> <li>▶ order printed copies of the handbook in English, French, Spanish, Portuguese, Russian and Arabic</li> <li>▶ consult selected sections in Arabic and Russian</li> </ul>	 online only	 hard copy
<b>Training Material Training modules</b> enable practitioners to apply the Sphere handbook effectively,	<ul style="list-style-type: none"> <li>▶ download Word and PowerPoint files of this Sphere Project Training Package</li> <li>▶ download versions of the material translated into French and Spanish</li> </ul>	 online only	 hard copy
<b>The Sphere Project: General Information</b> 20 page brochure	<ul style="list-style-type: none"> <li>▶ order this brochure from Sphere in English, French or Spanish giving an overview of the Sphere project including:               <ul style="list-style-type: none"> <li>▷ background to the project</li> <li>▷ experience of using Sphere in the field</li> <li>▷ outline of training support available</li> <li>▷ case studies on using the handbook</li> </ul> </li> </ul>	 hard copy	
<b>Sphere Project Introductory video</b> 9 minute introductory video to Sphere	<ul style="list-style-type: none"> <li>▶ order VHS copies in English, French, Spanish, Portuguese in PAL or NTSC format</li> </ul>	 VHS cassette	
<b>An introduction to Humanitarian Challenges</b> 45 minute orientation film for new aid workers	<ul style="list-style-type: none"> <li>▶ order VHS or DVD in English, French and Spanish, in PAL or NTSC format</li> <li>▶ available at cost</li> </ul>		
<b>Sphere Project newsletter</b>	<ul style="list-style-type: none"> <li>▶ electronic newsletter emailed quarterly with the latest about Sphere from across the world</li> <li>▶ subscribe for free to keep up to date with the project's latest activities and resources</li> </ul>	 online only	

## C. TOOLS

### Tools available from Sphere

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	Use	Available from: Sphere	Order from: Oxfam
<b>Lessons Learned</b> 2000-2002	<ul style="list-style-type: none"> <li>▶ share in best practice and review tips from practitioners in the field</li> <li>▶ download lessons learned reports in English, French and Spanish</li> </ul>	 online only	
<b>Health and nutrition</b> sector specific training modules	<ul style="list-style-type: none"> <li>▶ build technical capacity in health and nutrition through flexible modules produced by NGOs</li> </ul>	 online only	
<b>5 day training course</b> on quantitative indicators	<ul style="list-style-type: none"> <li>▶ gives an overview of some of the key issues in sectors in the Sphere handbook</li> <li>▶ links to the Sphere handbook and the Sphere training package</li> <li>▶ produced by Inter-Works</li> </ul>	 online only	

## CONTACT DETAILS

### Sphere

The Sphere Project  
 PO Box 372  
 17 Chemin des Crets  
 CH1211 Geneva 19  
 Switzerland  
 Email: [info@sphereproject.org](mailto:info@sphereproject.org)  
 Tel: + 41 22 730 4501  
 Fax: + 41 22 730 4905  
[www.sphereproject.org](http://www.sphereproject.org)

### Oxfam

Oxfam, c/o BEBC Distribution,  
 PO Box 1496, Parkstone,  
 Poole, Dorset, BH12 3YD  
 Tel: +44 (0) 1202 712933  
 Fax: +44 (0) 1202 712930  
 Email: [oxfam@bebc.co.uk](mailto:oxfam@bebc.co.uk)

## FURTHER TRAINING SUPPORT

Name	Address	Example of support
<b>ALNAP</b>	<a href="http://www.alnap.org">www.alnap.org</a>	▶ Downloadable training modules and training tips
<b>InterAction</b>	<a href="http://www.interaction.org">www.interaction.org</a>	▶ Database of humanitarian training resources
<b>Reliefweb</b>	<a href="http://www.reliefweb.int">www.reliefweb.int</a>	▶ Comprehensive links to humanitarian training organisations ▶ Search a database of humanitarian training by organisation, keyword, date or country



## D. MAXIMISING LEARNING

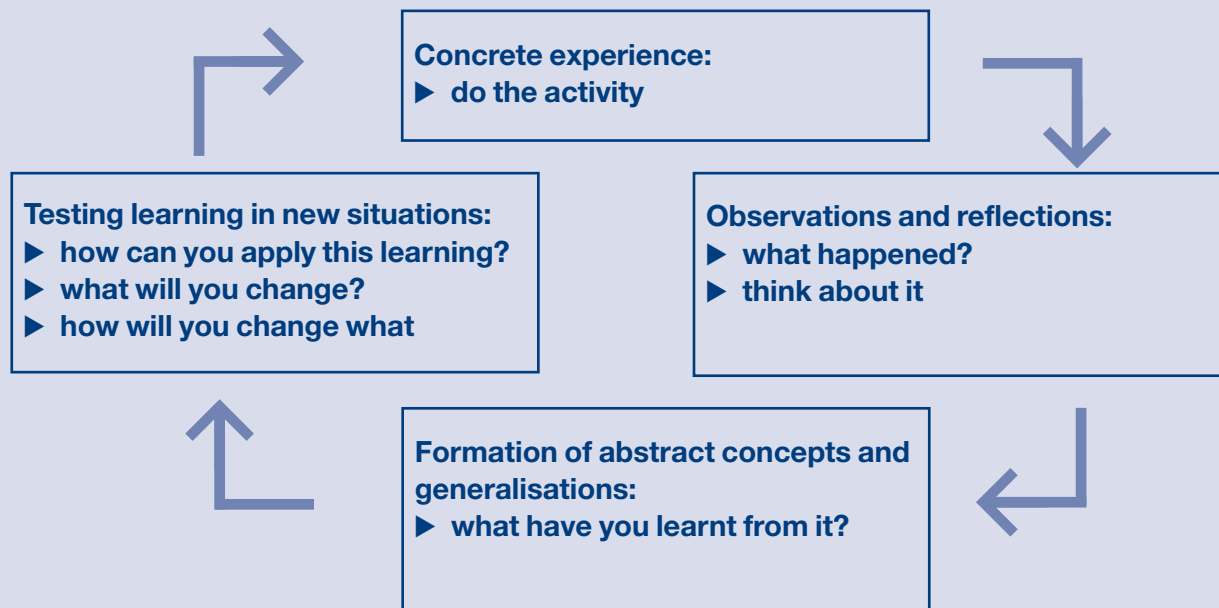
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Use this section to:

- identify ways to maximise the impact of your workshops
- review best practice training tips
- gain an overview of how to get the most from training methods used in Sphere workshops

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As adults, our previous knowledge and experience influences how we take in new information. Our culture, background, and education all have an impact on how we perceive and learn new things. Most adult learning emerges from concrete experiences: doing things, rather than reading or listening. In 1983, a learning theorist named Kolb drew the following model to represent "experiential learning":



People learn in different ways, and individuals will learn most effectively if the training approach used by trainers matches the individual's personal preferred learning style. This is one reason why variety is important, for example, following a theoretical presentation with a practical exercise to apply that learning.

**Honey and Mumford (1992) used Kolb's notion of experiential learning to describe four main types of individuals, and their preferred ways of learning.**

<b>Activists</b>	<ul style="list-style-type: none"> <li>▶ learn best from new experiences and problems</li> <li>▶ benefit from short "here and now" actions</li> <li>▶ enjoy challenges and going into action</li> </ul>
<b>Reflectors</b>	<ul style="list-style-type: none"> <li>▶ learn best from activities where they are encouraged to watch, think, and reflect before acting</li> <li>▶ are able to review what has happened</li> <li>▶ like to be given time to reach decisions</li> </ul>
<b>Theorists</b>	<ul style="list-style-type: none"> <li>▶ learn best when they have time to explore methodically the associations and interrelationships between ideas and events</li> <li>▶ like structured situations with clear purposes</li> <li>▶ like to prove the methodology or logic behind the subject and challenge themselves intellectually</li> </ul>
<b>Pragmatists</b>	<ul style="list-style-type: none"> <li>▶ learn best when there is an obvious link between the subject matter and a problem or opportunity in their job</li> <li>▶ like to concentrate on practical issues</li> <li>▶ like to try out techniques with coaching and feedback from a credible expert</li> </ul>

## D. MAXIMISING LEARNING

### Understanding how adults learn cont

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Studies show that individuals also normally have a bias as to whether they learn best by seeing, doing or hearing.

<b>Visual participants</b>	<ul style="list-style-type: none"><li>▶ Visual participants like to learn by seeing things, and will prefer visual input</li><li>▶ More than half of any group will be visual participants</li></ul>
<b>Kinaesthetic participants</b>	<ul style="list-style-type: none"><li>▶ Kinaesthetic participants prefer movement, and learning by doing things</li><li>▶ About a quarter of any group will be kinaesthetic participants</li></ul>
<b>Auditory participants</b>	<ul style="list-style-type: none"><li>▶ Auditory participants like to learn by hearing</li><li>▶ Participants are the least common, around 15 percent of any group</li></ul>

### Pacing learning

Learning needs to be carefully paced, and broken into short sections.  
Long workshops with large numbers of objectives and main messages will not be remembered.

People need time to:

- ▶ **process the learning**
- ▶ **reflect**
- ▶ **relax and sleep in order to commit information to memory and put it into practice**

The training team needs to be realistic with the host agency about what can be achieved in a workshop, and prioritise accordingly. It is more effective to train a few core points thoroughly then to overload the participants and lead to poor retention.

### Choosing the best approach to learning

Learning in the humanitarian community is complicated by the fact that it is decentralised, multi-cultural, multi-disciplinary, and in a perpetual state of responding to crises.

Against this background, choosing the most effective approach to learning involves:

- ▶ **identifying and understanding resources available for learning**
- ▶ **defining objectives**
- ▶ **defining the target audience**
- ▶ **researching the target audience's preferred learning style and learning needs**
- ▶ **understanding how the organisation behaves with respect to learning, for example is it recognised and rewarded?**
- ▶ **identifying learning opportunities**

### Using other learning opportunities

The Sphere Training Package provides information and tools focused around workshops. However, organisational needs and resources may mean that workshops are not always suitable.

Also, there are many opportunities to build on the learning from a Sphere workshop when back at work, through activities aimed at individuals and small teams.

The following examples suggest alternatives to workshops and how to reinforce the learning after a Sphere workshop.

#### Opportunities for individual learning

**Coaching:**

- ▶ one to one support, usually on immediate activities

**Mentoring:**

- ▶ one to one support, usually focused on the individual's longer term development

**Apprenticeships:**

- ▶ use the Sphere handbook to guide learning in an individual's early days in an organisation

**Distance or open learning:**

- ▶ training packages and activities that participants can complete at their own pace

**Handover briefings:**

- ▶ communicate lessons learned
- ▶ particularly important where staff turnover may be high

**Debriefings:**

- ▶ review actions in a structured way after an individual has completed an operation to identify areas for improvement

**Secondments:**

- ▶ learn by working with another team or function

**Workshadowing:**

- ▶ learn by observing and talking to another team, function or organisation

#### Opportunities for small team learning

**Local learning groups:**

- ▶ small groups of peers who meet regularly to share ideas and learn lessons

**Brainstorming meetings:**

- ▶ learn by generating ideas together
- ▶ gain different perspectives on a problem

**Peer mentoring and coaching within teams:**

- ▶ share best practice and expertise
- ▶ build self-reliance within the team
- ▶ enhance support networks within the team

**After-Action Reviews:**

- ▶ provide a space for reflection periodically to share lessons and compare progress to intended goals

**Monitoring:**

- ▶ help people to track progress and prioritise areas for improvement



#### ▷ **Welcome the participants**

You can use the following tools contained on the CD accompanying this book:

- ▶ **write a cheerful welcome message on a flipchart, and include the names of the trainers**

#### **Introduce the trainers**

Include the trainers' names, relevant background and experience and roles.

#### ▷ **Explore participants' expectations** For example:

- ▶ **ask participants to introduce themselves and say one expectation they have**
- ▶ **take expectations from the relevant section of the application forms**

Write expectations on a flipchart and keep this displayed during the workshop. Refer to it at the end of the workshop to encourage informative feedback and evaluations.

#### ▷ **Establish ground rules**

It is important to gain commitment from the participants to agree as a group certain ground rules during the training.

For example:

- ▶ **coming to workshop activities on time**
- ▶ **respecting each others' contributions**
- ▶ **giving constructive feedback**
- ▶ **respecting confidentiality**
- ▶ **agreeing on a smoking policy**

#### ▷ **Communicate the 'housekeeping' arrangements** Tell the group about:

- ▶ **any regulations set by the venue management**
- ▶ **the food or accommodation procedures**
- ▶ **health and safety facilities and regulations, for example:**
  - ▷ where the toilets are
  - ▷ what the fire regulations and procedures are
  - ▷ how to maintain a safe learning environment (cables, equipment, smoking etc.)

#### ▷ **Communicate the workshop aims and objectives and the agenda**

Participants need a clear idea of what they are aiming to achieve, and what they will do, and when.

Slides for each session show the learning objectives.

Any differences between the workshop's aims and objectives and the participants' expectations need to be identified and addressed at this early stage.

#### ▷ **Establish workshop processes** For example, establish:

- ▶ **a "parking lot" where you can write issues on a flipchart and display it for discussion at a later time**
- ▶ **"focus groups" who will meet at night and provide feedback to trainers on the results achieved for the day**

Ice breakers can help:

- ▶ **to reduce the anxiety that group members can feel at the start of a workshop**
- ▶ **participants get to know each other**

It is important to allow enough time at the start for participants and trainers to get to know one another's names and experience.

You may also want to use ice breakers to introduce different subjects for the workshop.

#### **Mission statement**

Ask participants to:

- ▶ **reflect on the mission statement for their organisation**
- ▶ **write the main points on a blank sheet of paper, but excluding the organisation's name**

Collect the sheets.

Read out one or two and try to guess which organisations these belong to. If

you are wrong, this helps to demonstrate that it is OK to make mistakes at this workshop.

Shuffle all statements and hand one to each participant.

Ask them to:

- ▶ **stand up**
- ▶ **try to find the person who wrote this sheet**

If they find the person ask them to ask what they want from the workshop.

If they do not find the person within 5 minutes, ask them to choose someone and ask what they want from the workshop.

Ask them to:

- ▶ **write down what the other person wants from the workshop**

When all the participants have found the person they are looking for, call the group back together.

Ask each participant to introduce the person they found to the rest of the group, and mention what the person expects to get from this workshop.

#### **The humanitarian wish**

Hand out cards, paper, or half-sheets to all participants.

Ask them to write:

- ▶ **the one thing they wish they could do better as a humanitarian**

After a few minutes ask everyone to:

- ▶ **stand and introduce themselves and state their wish**

Write up their answers on a flipchart. Mark repeats as tick marks.

After everyone has introduced themselves and made their wish, sum up the findings from the flipchart.

Ask the group:

- ▶ **'Do the Sphere process and outputs help anyone achieve their wish?'  
Regardless of the specific result from this exercise, you can use the idea of "the humanitarian wish" as a method to introduce and carry out the discussions in this module**

The groundrules for the sessions need to be:

- ▶ **be positive**
- ▶ **think of what we need to do our humanitarian work better**
- ▶ **actively seek achievable solutions**

Explain the development of the Sphere project and handbook has been driven by this kind of thinking and action.

#### Story telling

Use this when you only have one organisation represented in the workshop where group members may already know each other.

Explain that NGOs:

- ▶ **have an oral culture**
- ▶ **learn through telling stories**

Tell one story from your own experience which communicates the importance of Sphere to you. Try to choose an example which makes clear the need for greater quality and accountability.

Ask participants to:

- ▶ **find someone they know least**
- ▶ **tell a story from their work experience that highlighted the need for greater quality and accountability from NGOs**

When participants have told their stories, ask them to ask their partner what they want from the workshop.

When completed, ask everyone to sit down and contribute what their partners said they expected from the workshop.

Write these expectations on a flipchart.

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#### The assessment team

Ask the group to work in small teams.

Ask each team to:

- ▶ **imagine they are part of an assessment team that is to be presented to the local Government Relief Commissioner**
- ▶ **brief the Commissioner about the capacity of the team to conduct an assessment of damage after a disaster**

To do this, ask each team to:

- ▶ **develop a composite review of the team experience**
- ▶ **consider all the aspects that will present a compelling picture**
- ▶ **consider such typical areas as**
  - ▷ **education, total number of years of experience, current and previous employment**
  - ▷ **countries worked in, emergencies worked on, sectoral specialities, languages spoken**
  - ▷ **some details on personal life such as family and hobbies**
- ▶ **Ask them to record a summary of their team's expertise on a flipchart**

6 Allow up to 30 minutes

Call the group back together and ask them to:

- ▶ **briefly introduce themselves, describing current job responsibilities and indicate their expectations, hopes and concerns for the workshop**

#### First names, last names

Use this ice breaker in multi-cultural groups.

First ask the group to arrange themselves in a line arranged in alphabetical order according to first name.

Try giving the group a small space to make this line in, say between two walls of a narrow room. Do not assist the group. When completed, ask participants to shout out their first names from A to Z. Ask the group to arrange themselves in a line arranged in alphabetical order according to family name, and repeat the process.

Then repeat the process a third time, using "distance you travelled to come to this workshop".

#### Paired introductions

Ask participants to:

- ▶ **work in pairs**
- ▶ **ask each other a set of questions covering questions such as the following**
  - ▷ **name, organisation, experience in disaster response and one interesting fact about themselves**
- ▶ **use this information to introduce their partner to the group**

This is an effective way of removing the threat of doing a solo introduction, but it does depend on the listening abilities of participants - an inaccurate introduction by a partner can cause discomfort and confusion.

#### Solo introductions

Give the group a set of questions, for example:

- ▶ **name, role, experience in disaster response, an important experience in disaster response, or one problem currently experienced in the humanitarian system**

Ask individuals to introduce themselves based on these questions.

Use energisers when energy is flagging in a group after lunch, or to break two distinct parts of a session plan.

#### Move to the spot

Ask participants to:

- ▶ **spread around the room**
- ▶ **pick a particular 'spot' that is 'theirs'**

Ask people to move around the room, doing something suggested by the trainer, such as:

- ▶ **"Say hello to anyone wearing red"**
- ▶ **"Hop, skip or jump"**
- ▶ **"Whistle or make a strange sound"**
- ▶ **"Walk backwards"**

Explain that:

- ▶ **when you say "Stop!", everyone has to get back to their 'spot' as soon as possible**

This game can be fun if it is not done for too long - people will get bored quite quickly.

6 Allow up to 5 minutes.

#### Ha!Ha!Ha!

This is useful for changing pace or if there is tension in the group.

Explains that you are going to make them laugh.

Start by saying "Ha!".

Get the next person to repeat this, and add another "Ha!" themselves.

Participants then repeat what their neighbour says, adding another "Ha!" each time.

In this way, people are 'made' to laugh and very quickly everyone will be laughing. It really works!

#### Making rain

Ask everyone to sit in a circle.

Start drumming your fingers on a table or chair.

The next person starts to drum their fingers, then the next, until everyone is drumming their fingers.

The sound is like that of heavy rain or a thunderstorm.

End the exercise when everyone is 'making rain'.

#### A's and B's

This energiser can also be used to form random groups.

Find an open space for this exercise.

Ask participants to choose silently:

- ▶ **one person in the group to be their 'A'**
- ▶ **one person in their group to be their 'B'**

If asked, explain that there are no criteria for selecting As and Bs – it's entirely their choice.

Once everyone has made their choice ask them to:

- ▶ **get as close as possible to their 'A's' and at the same time as far away from their 'B's'**

Encourage people to move quickly - the only rule is that they are not allowed to touch anyone.

After a few minutes, ask participants to reverse the process (getting close to the 'B's' and far away from the 'A's').

This exercise will make people move about in unusual ways and should generate a lot of laughter.

In the Sphere training modules you will need to create small teams mainly for activities like presentations or case studies, and during some energising activities. There is no 'ideal' small team size, but a general rule is that eight should be a maximum and four to five a minimum. There are a variety of techniques for forming small teams, but the type and the size of a team will depend on the objectives for the exercise.

#### Random teams

To form random teams, you can assign participants numbers or letters that correspond to the required number of teams. All those with the same number or letter can then form a team.

For example:

- ▶ **assign numbers around the members of the group 1,2,3,4; 1,2,3,4**
- ▶ **then ask all the 1's to form a team, all the 2's to form a team and so on**

#### Specific teams

You can choose specific teams according to the needs of the exercise, for example:

- ▶ **technical sectors or expertise**
- ▶ **staff positions**
- ▶ **field or headquarters**
- ▶ **men or women**

You can either:

- ▶ **ask participants to either 'sign up' to form these teams**
- ▶ **select the members of the teams yourself**

### Getting the most from feedback

Giving and getting feedback effectively is essential to the Sphere training process. The aim is for trainers or participants to give constructive comments on people's feelings, attitudes and performance. It is particularly important after the case study exercises, when participants report back to the group and trainers respond with comments and relevant additional information.

There are some simple rules to follow when giving feedback:

- ▶ **give it as soon as possible**
- ▶ **refer to specific examples of behaviour that the individual is able to change**
- ▶ **balance negative comments with positive ones**
- ▶ **offer choices for change, but limit comments to one or two key points as there is a limit to what people can absorb at one time**
- ▶ **comment on performance and facts rather than personalities**
- ▶ **recognise that feedback is a personal opinion and not a universal truth**

Regularly review the progress of the group through the workshop. For example, you may want to review and map progress at the start of a new topic or at the end of a module.

By looking back over an activity, and re-capping you can:

- ▶ **check learning**
- ▶ **reinforce understanding and retention**
- ▶ **help participants to see the progress they are making**
- ▶ **identify participants' feelings about the training**

### Getting the most from second language training

It is very important to take into account the needs of participants who may be trying to take part in a workshop that is in a language foreign to them.

#### Verbal behaviour

- ▶ **Use clear, slow, speech. Enunciate each word clearly. Avoid using colloquial or slang expressions**
- ▶ **Try to repeat and reinforce important ideas by approaching a key idea in a number of different ways**
- ▶ **Use simple, short sentences. Avoid compound, long sentences**
- ▶ **Use active verbs: 'Use the handbook to...' Avoid passive verbs: 'The handbook can be used to...'**

#### Non-verbal behaviour

- ▶ **Use a variety of visual aids to get your messages across clearly, for example, pictures, graphs, tables, and slides**
- ▶ **Use more facial and hand gestures to emphasise the meaning of words**
- ▶ **Act out and demonstrate as many ideas as possible. Show rather than just tell**
- ▶ **Pause more frequently than you would with native speakers**
- ▶ **Hand out written summaries of any verbal presentations**

#### Avoid assumptions

- ▶ **When there is a silence, wait. Do not jump in to fill the silence. The other person is probably just thinking more slowly in the non-native language or translating**
- ▶ **Avoid making the assumption that poor grammar and pronunciation means that the person lacks intelligence; it is usually just a sign of second language use**



#### Comprehension

- ▶ Do not just assume that they understand
- ▶ Do not simply ask them if they understand. Check their comprehension by devising ways to explore what they have learnt. For example, find ways to help the participants explain what they understand to you

#### Design

- ▶ Take more frequent breaks as learning in a second language is exhausting
- ▶ Divide the material into smaller modules
- ▶ Allocate more time for each module than usual in a monolingual program

#### Motivation

- ▶ Use your speech and body language to encourage contributions from non-native language participants
- ▶ Try to draw out the quieter members of the group
- ▶ Avoid embarrassing foreign speakers, or drawing attention to their language mistakes – what they contribute is more important than how they say it



Case studies are central to the training approach. Small teams are presented with information about a situation and are asked to analyse the issues and provide recommendations. You can use case studies to:

- ▶ **develop understanding, skills and knowledge**
- ▶ **provide an invaluable and relevant opportunity to reinforce learning**
- ▶ **demonstrate how their learning is applied in real or realistic situations**

The situation can be real or fictional. Real case studies have more credibility, but risk diverting group discussions into retrospective analysis on what happened, rather than the exercise at hand. Fictional case studies can be adapted to local situations and have an additional empowering quality for participants. However, you need to collect data well in advance of the training event in order to adapt a scenario to a training case study. The task associated with the study also has to be relevant to the session module and the country dilemmas.

You need to:

- ▶ **allow sufficient time for teams to present their ideas to the main group when they have finished the case study**
- ▶ **give equal time to each team**
- ▶ **ensure that participants' efforts are recognised**

The aim is that the case studies will provide:

- ▶ **useful outcomes to provoke discussion amongst participants**
- ▶ **a 'safe' framework for participants to transfer learning to their real work situations**

#### Advantages

- ▶ **Participants can 'practice' and analyse a real life situation in a risk-free environment**
- ▶ **There is a high participation level and learning can be transferred to real work situations**
- ▶ **Case studies need careful preparation before a training session, and must be realistic to effectively reinforce learning**
- ▶ **There is a danger of stereotyping situations and over-simplifying the issues**

#### Disadvantages

- ▶ **Case studies need careful preparation before a training session, and must be realistic to effectively reinforce learning**
- ▶ **There is a danger of stereotyping situations and over-simplifying the issues**

#### Tips

- ▶ **don't give too much information**
- ▶ **make sure that the information in the case study is accurate and relevant to the learning points - if it is not, there is a danger of losing credibility**

The presentations in the Sphere training modules aim to give background information in a range of topics to ensure that all participants can engage in the participatory case studies with a similar level of information.

Although they do not involve participants as closely as more active methods, a lecture or presentation:

- ▶ **can still be the most efficient way of delivering content**
- ▶ **may be welcomed by some cultures who are used to learning in this way**
- ▶ **can be powerful, for example when well structured to deliver information, facts and theory to enhance participants' existing skills and knowledge**

In general:

- ▶ **try to keep presentations shorter than 20 to 30 minutes**
- ▶ **use personal anecdotes, humour and visual aids to make presentations more interesting and active**
- ▶ **read the background note for the module as part of your preparation, as this will help you to understand the key points**
- ▶ **recognise that presentations are most effective when followed up by a participatory exercise to reinforce and apply learning**

Things to consider:

- ▶ **It is tempting to always elicit information from the participants, however presentations/lectures provide an ideal way of imparting facts or information when a group is new to a subject**
- ▶ **Retention is poor. Less than 20% of the information presented is likely to be remembered a week later!**
- ▶ **Presenting requires great skill from the trainer to hold the attention of the audience**
- ▶ **Build in an exercise or questions, humour and visual images to maintain participants' interest and improve understanding and retention**
- ▶ **Remember that you do not always have to start with the lecture: the learning points in exercises or discussions can be reinforced by a lecture**
- ▶ **Stick to one main point/theme. Avoid overloading the participants**
- ▶ **Relate information to real and relevant examples as often as possible**
- ▶ **Always try to support talks with clearly written handouts**
- ▶ **Devise a system for your notes, but don't read from a script. You need to be familiar enough with your material to need only key words to prompt you**
- ▶ **Repeat main points – say what you are going to say, say it, and say it again reinforcing understanding each time – but don't be boring!**



## D. MAXIMISING LEARNING

### TRAINING METHODS

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#### Advantages

- ▶ The trainer has a high level of control over content and time, and facts, figures and theory can be transmitted clearly
- ▶ This method does not always demand active participation from participants and some participants may prefer to learn this way

#### Disadvantages

- ▶ Participation levels can be low and some participants may lose interest
- ▶ The trainer needs to be skilled at presenting information in a clear and interesting way
- ▶ Many presenters make the mistake of trying to squeeze in too much information

#### Tips

- ▶ keep it short and simple (KISS) - 20 minutes is the maximum attention span for most people
- ▶ use anecdotes, humour and visual aids to add interest and impact to presentations

This is a useful technique for quickly generating creative ideas, information and hopes and fears by encouraging everyone's contributions in response to an idea, question or problem.

The results of brainstorms can be used in a variety of ways, including:

- ▶ **ice breakers**
- ▶ **idea creation**
- ▶ **finding solutions**
- ▶ **assessing people's existing levels of attitudes, skills and knowledge**

Make clear to participants:

- ▶ **the purpose of the brainstorm, for example to**
  - ▷ **introduce a topic**
  - ▷ **provide information for an exercise following the brainstorm**
- ▶ **what they need to do**

Your role is to run the brainstorm, with little direct contribution to the information that is collected.

The purpose of the brainstorm will determine whether you:

- ▶ **accept and record all contributions (uncontrolled brainstorm)**
- ▶ **select only some items to record (controlled brainstorm)**

Things to consider:

- ▶ **Define the topic/problem/issue as a statement or question**
- ▶ **Give people time to think (and write if necessary) on their own, or in a pair or group**
- ▶ **Summarise long answers into one word, and check that any changes you make are approved by the person offering the contribution**
- ▶ **Allow people to keep quiet if they cannot contribute**

#### Advantages

- ▶ **Brainstorms can generate a lot of ideas, solutions and information quickly**
- ▶ **Brainstorms can involve all participants in a non-threatening way**

#### Disadvantages

- ▶ **It is important to control the quality and quantity of the information produced so that the main aim of the exercise is adhered to**
- ▶ **Relies on the ability of the trainer to facilitate in a non-judgmental way**
- ▶ **The trainer needs to be able to summarise ideas/sentences into one word equivalents**

#### Tips

- ▶ **need to set clear parameters before doing the exercise (controlled vs. uncontrolled)**
- ▶ **if it is an uncontrolled brainstorm be careful not to evaluate input as it is given**

Structured discussions:

- ▶ are an important part of the Sphere training modules
- ▶ are designed to initiate and focus debates or to emphasise key learning points
- ▶ can develop participants' understanding
- ▶ are useful for finding out how a group is responding to a contentious subject, or for covering all the angles on a particular topic

You can set up discussions in a number of ways, for example:

- ▶ in the main group, or in small teams
- ▶ encouraging competition in the discussion
- ▶ targeting particular subjects
- ▶ encouraging less talkative members of a group to take part

You need to:

- ▶ set topics, questions or activities
- ▶ decide whether you will take part in the discussion, or whether you will let the group have the discussion on their own, with or without a nominated leader
- ▶ aim only to influence and control the discussion if there is a clear need, such as a misunderstanding, or if the discussion moves off the subject
- ▶ manage these discussions carefully
- ▶ ensure that time is not wasted on irrelevant points
- ▶ prevent individuals from dominating the discussion
- ▶ enable all participants to express their views, even where these views may be interpreted as 'provocative'

Ways to manage contributions include:

- ▶ A pre-arranged system whereby people indicate that they want to speak, and wait their turn to be asked
- ▶ 'The conch system', whereby only the person holding a nominated object, a 'conch', ball, sock etc. can speak. They can pass the 'conch' to the next person they choose to speak
- ▶ Taking turns to speak in order, for example, round the circle, or in numbered order
- ▶ Using cards with topic headings to discuss more than one aspect of a subject

Things to consider:

- ▶ Discussions are not an easy alternative and can backfire, or be unproductive. Always ensure participants have clear instructions and an aim
- ▶ Discussions can occur at any time in a session and are an excellent means of stimulating interest, participation, motivation and understanding
- ▶ Discussions are useful for meeting learning objectives that involve changing attitudes, comparing opinions, contrasting knowledge, increasing motivation and problem solving

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### TRAINING METHODS: Structured discussions cont

Advantages	Disadvantages
<ul style="list-style-type: none"><li>▶ Can provide instant feedback for the trainer</li><li>▶ Utilises the diversity in a group and can be challenging and thought provoking for individuals</li></ul>	<ul style="list-style-type: none"><li>▶ The quality of learning depends on participants' existing experience or knowledge</li><li>▶ There is a danger of conflict and tension if discussions are not facilitated or 'chaired' carefully</li></ul>
<b>Tips</b> <ul style="list-style-type: none"><li>▶ encourage participation by structuring the discussion and using non-threatening ways of drawing out quieter participants</li><li>▶ beware of the danger of some people dominating the discussion</li></ul>	

This is a core technique in training used at all stages in any learning process and additionally to assess participants' understanding and attitude to the topics being raised.

You can use questions in a planned way to:

- ▶ **elicit information**
- ▶ **encourage thinking processes**
- ▶ **stimulate thinking and awareness**
- ▶ **assess levels of knowledge and understanding**
- ▶ **clarify key points**
- ▶ **enable participants to explore and share their experience or knowledge**
- ▶ **start discussions**

Although trainers will usually be the ones asking questions, and handling answers, it can also be useful to:

- ▶ **throw questions from participants back to the group**
- ▶ **give control of the questions to the group**

Things to consider:

- ▶ **Use open questions for example, why, who, what, how to give the participant flexibility in how they respond, and thus give you a clearer idea whether a participant has understood a topic**
- ▶ **Use closed questions which give you short, 'yes' 'no' answers when you need confirmation of something, for example: 'Is this an aim?'. However, they are not generally useful for checking more complex understanding or learning**
- ▶ **'Pick up questions' return to a previous point or discussion. These can be useful at quiet moments, or to encourage participants to make links between subjects**
- ▶ **Direct questions – these are normally directed at one individual with the purpose of inviting them to join in or wake up! Obviously these questions can be intimidating, and this may be the effect you desire. They are also useful for drawing out contributions from quieter members of the group**

#### Advantages

- ▶ **Direct and immediate way of clarifying and of gaining factual information**
- ▶ **When pre-planned, questions can be used to test understanding and levels of learning**

#### Disadvantages

- ▶ **The quality of the answers depends on the quality of the questions**
- ▶ **Participants can feel threatened and intimidated by insensitive questioning techniques**

#### Tips

- ▶ **before starting a training session think of some key questions that will help you to assess participants' understanding of the learning points**

Use these short, energetic activities to help participants to:

- ▶ **move around**
- ▶ **relax**
- ▶ **take a break from what they are doing**
- ▶ **get to know one another better**

Some ice breakers may be relevant to a topic, some may develop skills, and others are designed to change the pace or focus of the training.

Energisers and games can be particularly useful to :

- ▶ **build energy after a long presentation**
- ▶ **make a clear change between one subject and another**
- ▶ **start the first afternoon session of a workshop**

Choose energisers carefully with a sensitivity to the cultural, gender and religious norms of the group, and people's physical abilities.

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>▶ <b>Provides a break and energises participants, particularly before or after a long or difficult session</b></li> <li>▶ <b>Can be used as a quick skills development exercise</b></li> </ul>	<ul style="list-style-type: none"> <li>▶ <b>The relevance of the exercise can be lost on participants, and they can be seen as silly or a waste of time</b></li> <li>▶ <b>Some energisers involve a lot of physical activity, which needs to be carefully controlled</b></li> </ul>

Tips

- ▶ **always try to use an energiser in the after lunch session, known as the 'graveyard' because people's energy tends to be low**
- ▶ **only use ice breakers that you personally are comfortable with, otherwise they can be unconvincing for participants**




## E. POWERPOINTS

Use this section to:

81

- ▶ review the PowerPoint slides used in each Module
- ▶ look at the slides alongside the Trainer's Notes in Part 2: Training Material as you prepare and run your workshop

<b>MODULE 1</b>	
<b>Executive briefing</b>	
<b>Session 1</b>	<b>85</b>
<b>Session 2</b>	<b>88</b>
<b>Optional toolkit</b>	<b>89</b>
<b>MODULE 2</b>	
<b>Session 1</b>	<b>90</b>
<b>Session 2</b>	<b>90</b>
<b>Session 3</b>	<b>92</b>
<b>Session 4</b>	<b>95</b>
<b>Optional toolkit</b>	<b>96</b>
<b>MODULE 3</b>	
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<b>Session 3</b>	<b>100</b>
<b>Session 4</b>	<b>101</b>
<b>Session 5</b>	<b>103</b>
<b>Session 6</b>	<b>105</b>
<b>Optional toolkit</b>	<b>106</b>
<b>MODULE 4</b>	
<b>Session 1</b>	<b>107</b>
<b>Session 2</b>	<b>110</b>
<b>Optional toolkit</b>	<b>111</b>



The Sphere Project

### Executive briefing on the Sphere Project

Sphere Project Module 1

### Tools to put principles and values into action

Introduction  
What is Sphere?

The Code of Conduct

The Humanitarian Charter

Standards common to all sectors

Water Supply, Sanitation and Hygiene promotion

Food Security, Nutrition and Food Aid

Shelter, Settlement and Non-Food items

Health Services

**2004 Edition**

Each Chapter includes

- Minimum standards
- Key indicators
- Guidance notes

Sphere Project Module 1

### Why is the Sphere handbook needed?

- NGO concern with quality and accountability**
  - has been ongoing
- Historic practice no longer sufficient**
  - Increasing complexity of disasters
  - Numbers of disasters increasing
  - Changing nature of humanitarian community and increasing diversity
  - Increasing number of actors with different measures of success
- Post- Rwanda 1994**
  - Multi-donor evaluation "Unnecessary deaths"

Sphere Project Module 1


### Extensive consultation

1997 Initial consultation → 2000 handbook launched → 2004 handbook revised edition

4000+ people

400 organisations

80 countries around the world



Sphere Project Module 1

### Sphere process

- Make argument for universal assistance
- Obtain agreement on core principles and actions
- Achieve consensus on technical indicators

Sphere Project Module 1

### Main project activities

- Awareness raising
- Distributing the handbook and other tools
- Technical revisions of the handbook
- Training on how to apply the handbook
- Support to agencies

Sphere Project Module 1

### Management and funding

- **Member networks of Steering Committee for Humanitarian Response**
  - 7 networks plus ICRC & IFRC
- **InterAction**
- **VOICE and ICVA**
- **Additional funding**
  - Australia, Belgium, Canada, Denmark, England, Finland, Ireland, New Zealand, Norway, The Netherlands, Sweden, Spain, United Kingdom, United States and ECHO.

Sphere Project Module 1

### Humanitarian Charter: Sections

- **Commitment to promote**
  - observance of fundamental humanitarian principles
  - appreciation of our own ethical obligations
- **Statement of humanitarian principles**
- **Description of roles, duties & responsibilities**
- **Commitment to consistently achieve the minimum standards**
- **Acknowledgement that our fundamental accountability is to those we seek to assist**

Sphere Project Module 1

### Standards, key indicators and guidance notes

#### Minimum standards:

- Minimum level (of service) in humanitarian assistance

#### Key indicators:

- Signals that show whether a standard has been attained
- Measure and communicate
  - impact, result, process or methods used
- Qualitative or quantitative

#### Guidance notes:

- Disseminate experience
- Illuminate areas of controversy
- Help use indicators properly in context

Sphere Project Module 1

### Applications

- Strengthen advocacy
- Measure performance
- Rationalise resource use
- Enable coordination
  - more than 20 languages
- Inform training curriculum
- Promote participation
- Evaluate policies and procedures

Sphere Project Module 1

### Applications: project cycle



Sphere Project Module 1

### In conclusion

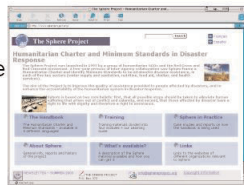
- Declaration that populations affected by conflict and calamity have a right to assistance
- Commitment toward a defined and measurable level of competence and delivery
- Distillation of current global knowledge and experience into a practical tool for:
  - individuals
  - their organisations
  - the humanitarian community
- Challenge to all actors in the humanitarian community for increased accountability and quality

Sphere Project Module 1

#### [www.sphereproject.org](http://www.sphereproject.org)

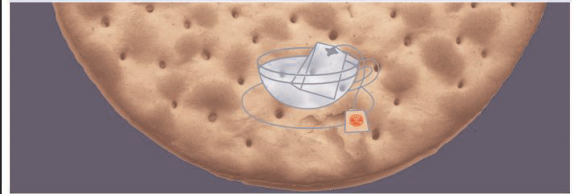
Resources on the web-site include:

- Handbook in English, French, Spanish, Russian and Arabic
- Training material and trainer's guide
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- Lessons from institutionalising Sphere
- Annual reports
- Newsletters



Sphere Project Module 1

BREAK!



Sphere Project Module 1

### Module 1

#### Session 1



The Sphere Project

### What is Sphere and why is it important?

Sphere Project Module 1

### Learning objectives

- To discuss some current trends or events that have impacted on our understanding of **“humanitarianism”**
- To describe why the Sphere Project is important
- To describe the Sphere Project's structure and process
- To describe the Sphere handbook's basic structure
- To describe the difference between
  - Minimum standards
  - Key indicators
  - Guidance notes

Sphere Project Module 1

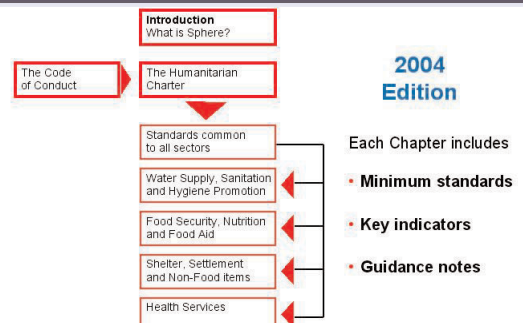
### Context and Content



Photos - UNHCR

Sphere Project Module 1

### Tools to put principles and values into action



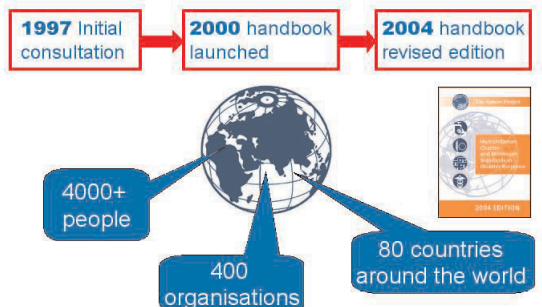
Sphere Project Module 1

### Why is the Sphere handbook needed?

- **NGO concern with quality and accountability**
  - has been ongoing
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Sphere Project Module 1

### Extensive consultation



Sphere Project Module 1

### Sphere process

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Sphere Project Module 1

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Sphere Project Module 1

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Sphere Project Module 1

### Sphere handbook

Find and mark these sections in your book to help you find key topics quickly:

- The Humanitarian Charter
  - The Code of Conduct
  - Standards Common to all sectors
  - The diagram and contents for each technical chapter
  - The introduction
  - The index
- Now choose your favourite chapter, and look at the standards in that chapter

Sphere Project Module 1

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Sphere Project Module 1

### Humanitarian Charter: Sections

- **Commitment to promote**
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  - appreciation of our own ethical obligations
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- **Commitment to consistently achieve the minimum standards**
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Sphere Project Module 1



### Humanitarian Charter: Informed by international law

- **Right to life with dignity**
  - Universal Declaration of Human Rights
  - Civil, political, economic and social covenants
  - The Geneva Conventions
  - Convention against Torture
  - Rights of the Child
- **The distinction between combatants and non-combatants**
  - Geneva Conventions
  - Rights of the Child
- **The principle of non-refoulement**
  - Convention on the Status of Refugees
  - Convention against Torture
  - Rights of the Child

Sphere Project Module 1

### What is a minimum standard?

**The minimum level of service to be attained in humanitarian assistance**

**General nutritional support standard 1:  
Nutrient supply**

**The nutritional needs of the population are met.**

see page 90/137

Sphere Project Module 1

### What are key indicators?

**Signals that show whether a standard has been attained. They provide a way of measuring and communicating both the impact, or result, of programmes as well as the process, or methods, used.**

**The indicators may be qualitative or quantitative.**

#### Key indicators

- Levels of moderate malnutrition are stable at, or declining to, acceptable levels.
- There are no cases of scurvy, pellagra or beri-beri.
- Rates of xerophthalmia or iodine deficiency disorders are not of public health significance (see guidance notes...)

see page 90

Sphere Project Module 1

### What are guidance notes?

**They disseminate experience, illuminate areas of controversy, and help use indicators properly in context**

#### Guidance notes

**"...deciding whether levels of malnutrition are acceptable requires analysis of the current situation in light of local norms..."**

see page 92

Sphere Project Module 1

### Standards, key indicators and guidance notes

**Minimum standards**

**Key indicators**

**Guidance notes**

When asked, please find examples of each of these in your handbook.

Sphere Project Module 1

### In conclusion: Change

- Humanitarian crises continue
- Chaotic growth of humanitarian organisations and agendas
- Pressures on humanitarians to better define, coordinate and account for humanitarian assistance
- Inter-agency process to clarify the humanitarian basis for action

Sphere Project Module 1

### In conclusion: Tools

#### Humanitarian Charter:

- provides the framework to convert the appreciation of rights into action

#### Minimum standards:

- provide standards to aspire to
- enable planning

#### Key indicators:

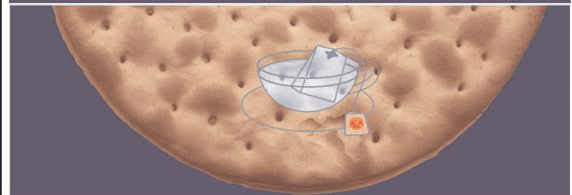
- provide signals to assess whether the standards have been met

#### Guidance notes:

- provide information to help apply indicators in context

Sphere Project Module 1

### BREAK!



Sphere Project Module 1

### Module 1

#### Session 2



The Sphere Project

### How does the Sphere handbook work?

Sphere Project Module 1

### Learning objectives

- To discuss how to use the handbook in practical humanitarian work
- To highlight the Sphere handbook's role in mitigating the effects of bias
- To debate challenges and opportunities of using the Sphere handbook
- To explore evidence and experience emerging from the practice

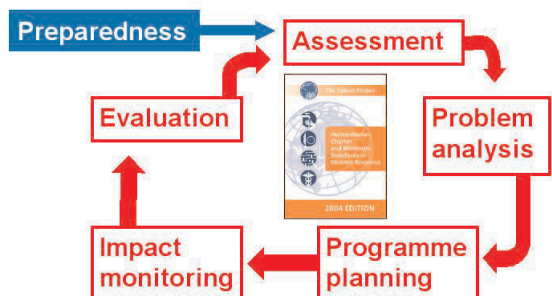
Sphere Project Module 1

### Applications

- Strengthen advocacy
- Measure performance
- Rationalise resource use
- Enable coordination - more than 20 languages
- Inform training curriculum
- Promote participation
- Evaluate policies and procedures

Sphere Project Module 1

### Applications: project cycle



Sphere Project Module 1

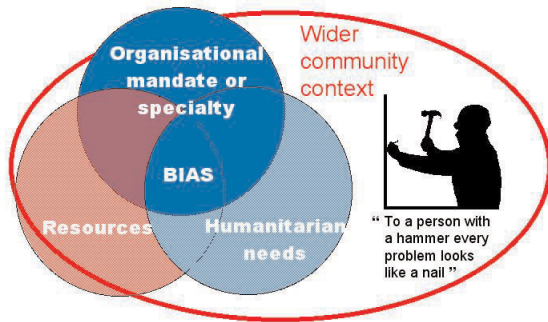


## E. POWERPOINTS

### MODULE 1: An introduction to Sphere

89

#### Using Sphere to mitigate bias



Sphere Project Module 1

#### Challenges and opportunities



For the applications listed earlier:

- 1 Discuss the challenges, risks or constraints
- 2 Discuss the opportunities or benefits
- 3 Discuss strategies to mitigate 1 and maximise 2

Sphere Project Module 1

#### What Sphere represents

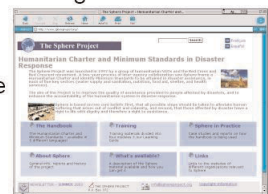
- Declaration that populations affected by conflict and calamity have a right to assistance
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Sphere Project Module 1

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Sphere Project Module 1

#### Module 1

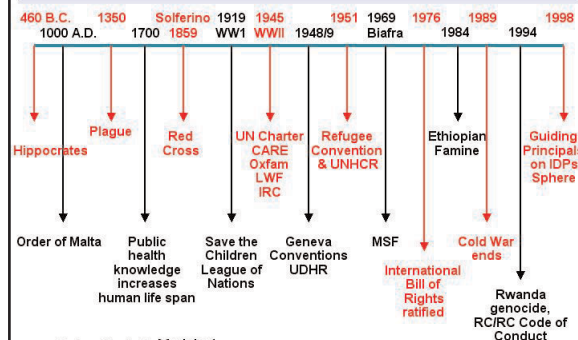


The Sphere Project

#### Optional toolkit


Sphere Project Module 1

#### Example milestones in humanitarianism



Sphere Project Module 1


Module 2

 The Sphere Project

**The Humanitarian Charter**

Sphere Project Module 2

Module 2

Session 1  The Sphere Project

**Main messages of the Humanitarian Charter**

Sphere Project Module 2

Learning objectives

- To identify key messages of the Humanitarian Charter
- To demonstrate how the Humanitarian Charter provides a framework for carrying out humanitarian work


Sphere Project Module 2

Task: Humanitarian identity

- 1 Which principles inform how humanitarian action (protection and assistance) is carried out?
- 2 Why is it necessary for humanitarian agencies to consider the roles and responsibilities of others?
- 3 To whom are humanitarian agencies accountable?

Sphere Project Module 2

Module 2

Session 2  The Sphere Project

**Fundamental Human Rights concepts**

Sphere Project Module 2

Learning objectives

- To identify the source of Principle 1 of the Humanitarian Charter 'the right to life with dignity'
- To describe the basic concept of human rights and dignity
- To describe legal and moral duties and obligations in relation to human rights
- To examine the universality of human rights and values

Sphere Project Module 2

#### Task: Concepts

- 1 Where do human rights come from?
- 2 Who is entitled to human rights?
- 3 Who can violate human rights?
- 4 How much food is the human right to food?
- 5 Who has responsibility for ensuring people achieve their rights?
- 6 What does it mean to be a citizen?

Sphere Project Module 2

#### The Humanitarian Charter

- **The rationale**
- **The principles**
- **The roles and responsibilities**
- **Accountability**
- **The link to the Code of Conduct**
- **Sources**

Sphere Project Module 2

#### The rationale

**“ Humanitarian agencies committed to this Charter and to the Minimum Standards will aim to achieve defined levels of service for people affected by calamity or conflict, and to promote the observance of fundamental humanitarian principles.”**

Sphere Project Module 2

#### The principles

**“ We reaffirm our belief in the humanitarian imperative and its primacy... We will act in accordance with the principles of humanity and impartiality, and with the other principles set out in the Code of Conduct for the RC/RC and NGOs in Disaster Relief.”**

Emphasis by Sphere

Sphere Project Module 2

#### The right to life with dignity...

**“We understand an individual's right to life to entail the right to have steps taken to preserve life where it is threatened, and a corresponding duty on others to take such steps.**  
Implicit in this is the duty not to withhold or frustrate the provision of life-saving assistance”

UNDHR

Sphere Project Module 2

#### How much food...is the human right to food?

**“Sphere's specific standards in the provision of health care, water and sanitation, shelter, food security and nutrition translate people's rights into specific agency duties”**

(Hugo Slim 2001)

Emphasis by Sphere

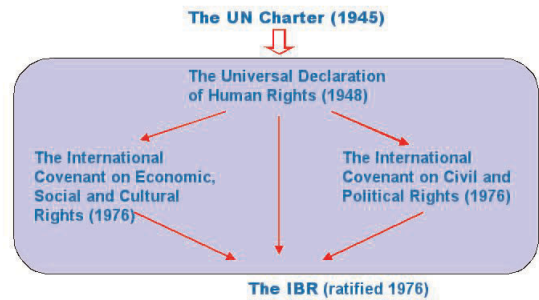
Sphere Project Module 2

### Universal declaration of Human Rights...

- The UDHR is a declaration and therefore not a legal document
- However it is still used as a source document for international rights law

Sphere Project Module 2

### Human Rights: The International Bill of Human Rights



Sphere Project Module 2

### Additional human rights treaties

- **convention on the prevention and punishment of the crime of genocide** (1948)
- **International convention on the elimination of all forms of racial discrimination** (1965)
- **convention against torture and other cruel, inhuman or degrading treatment or punishment** (1984)
- **convention on the elimination of all forms of discrimination against women** (1979)
- **convention on the rights of the child** (1989)

Sphere Project Module 2

### Module 2

#### Session 3



The Sphere Project

### The International legal framework

Sphere Project Module 2

### Learning objectives

- To identify the source of **Principle 2** the distinction between combatants and non-combatants
- **Principle 3** the right to non-refoulement
- To describe basic principles and scope of International Humanitarian Law (IHL)
- To describe legal duties and obligations of states to protect civilians and provide assistance
- To examine the law in relation to the status of refugees and IDPs

Sphere Project Module 2

### The distinction between combatants and non-combatants...

**"Non-combatants are protected under international humanitarian law and are entitled to immunity from attack"**

Sphere Project Module 2

#### Two types of law

- To regulate the conduct of hostilities (Law of the Hague)
- To protect persons not (or no longer) taking part in hostilities (i.e. civilians) (Law of Geneva)
- Balance between military necessity and humanitarian considerations

Sphere Project Module 2

#### The Geneva Conventions of 1949

- **First Convention** - on the care of the wounded and sick members of armed forces in the field
- **Second Convention** - on the care of the wounded, sick and shipwrecked members of armed forces at sea
- **Third Convention** - on the conduct of combatants and the treatment of prisoners of war (between states)
- **Fourth Convention** - on the protection of civilian persons and populations in times of war (duties and responsibilities of occupying power)

Sphere Project Module 2

#### Applications of the Geneva Conventions

- **Apply in times of international conflict**
- **Addressed to states - impose duties on states and warring parties**
- **Provide the conditions for the delivery of humanitarian assistance and protection**

Sphere Project Module 2

#### Internal armed conflict

**Article 3**, common to the four Geneva Conventions refers to *internal* armed conflicts - "**a mini Convention**"  
**In 1977, Protocol II**, relating to the Protection of Victims of Non-International Armed Conflicts, was developed to further Common Article 3

Sphere Project Module 2

#### Geneva Convention IV - Article 10 General Provision

"The provisions of the present Convention present no obstacle to the humanitarian activities which the International Red Cross or any other **impartial humanitarian organisation** may, **subject to the consent** of the High Contracting Parties to the conflict concerned, undertake for the protection of civilian persons and their relief "

Emphasis by Sphere

Sphere Project Module 2

#### Additional protocol II - Article 18 Relief societies and relief actions

"If the civilian population is suffering undue hardship owing to a lack of supplies essential for its survival, such as foodstuffs and medical supplies, relief actions for the civilian population which are of an exclusively **humanitarian and impartial nature** and which are **conducted without any adverse distinction** shall be undertaken subject to the consent of the High Contracting party concerned"

Emphasis by Sphere

Sphere Project Module 2



### Module 2



The Sphere Project

### International refugee law

Sphere Project Module 2

### The principle of non-refoulement

"No refugee shall be sent back to a country in which his or her **life or freedom would be threatened** on account of race, religion, nationality, membership of a particular social group or political opinion; or where there are substantial grounds for believing that s/he would be in **danger of being subjected to torture**"

Emphasis by Sphere

Sphere Project Module 2

### Refugee Law

- 1951 Convention on the status of refugees**
- 1967 Protocol on the status of refugees**
- 1969 OAU** (Organisation of African Unity convention)
- 1984 Convention preventing torture and other cruel, inhuman or degrading treatment or punishment**
- 1984 Cartegna declaration**
- UNHCR Executive committee conclusions**

Sphere Project Module 2

### Who is a refugee?

#### 1951 Convention on the status of refugees

A refugee is someone who:

- Is outside his/her country of origin
- Has a well founded fear of prosecution because of his/her - race, religion, nationality, membership in a particular social group or political opinion and
- Is unwilling to avail himself/herself of the protection of that country, or to return there, for fear of persecution

Sphere Project Module 2

### Who is a displaced person?

#### 1998 IDP guidelines

IDPs are defined as those persons forced or obliged to flee from their homes, "...in particular as a result of or in order to avoid the effects of armed conflicts, situations of generalised violence, violations of human rights or natural or human-made disasters, and **who have not crossed an international recognised State border**"

- Francis Deng (1998)

Emphasis by Sphere

Sphere Project Module 2

### Enforcement mechanisms

- **National courts**
- **Ad hoc tribunals**
- **International Court of Justice**
- **International Criminal Court**
- **Sanctions**
- **UN Security Resolutions**

Sphere Project Module 2

### The main legal instruments

	Human Rights	Humanitarian Law	Refugee Law
Example of documentary source	The International Bill of Rights	The Geneva Convention	The Convention on the Status of Refugees
Core ideas	The right to life with dignity	Distinction between combatants and non-combatants	Principle of non-refoulement
Who has rights?	Everyone	Non-combatants in conflict	Refugees, but not IDPs
Who has duties?	States (legally) but everyone's (morally)	Warring parties	States where refugees reside
When do they apply?	Most apply always, some don't in states of emergency	In armed conflicts only	Wherever refugees exist

Sphere Project Module 2

### Module 2

#### Session 4



The Sphere Project

### Implications of the Humanitarian Charter

Sphere Project Module 2

### Learning objectives

- To describe implications for programme planning and design that arise from the Humanitarian Charter
- Recognise the importance of human rights and 'dignity' as underpinning principles in humanitarian operations
- Identify how their organisations' current activities may be improved to help people affected by disasters to achieve their human rights

Sphere Project Module 2

### The humanitarian imperative

- **To prevent and alleviate human suffering; to protect life and health** (improve human condition); **and to ensure respect for the human being**
- **It implies a right to:**  
receive humanitarian assistance  
offer humanitarian assistance
- **The humanitarian imperative implies an overall protection approach:**  
the respect of international humanitarian law and human rights

Sphere Project Module 2

### Humanitarian action

**"Meeting essential needs and restoring life with dignity are core principles that should inform all humanitarian action."**

The Sphere Humanitarian Charter

Sphere Project Module 2

### Dignity

- **Autonomy and self-determination**
- **Informed consent and confidentiality**
- **Recognition of cultural attributes**
- **Obligations on states**  
process and goals
- **Affronts to dignity have a direct impact on people achieving their rights**

Sphere Project Module 2

### PANELS

- **P**articipation
- **A**ccountability
- **N**on-discrimination
- **E**mpowerment
- **L**aw
- **S**ustainability

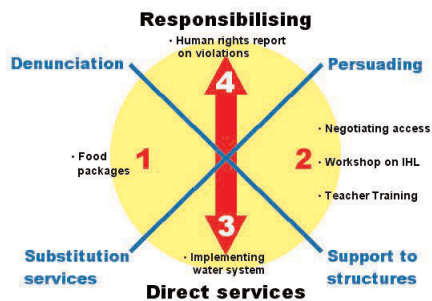
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### Complementarity mapping



Sphere Project Module 2

### Complementarity mapping



Sphere Project Module 2

### Module 2

#### Optional toolkit



The Sphere Project

### The Humanitarian Charter

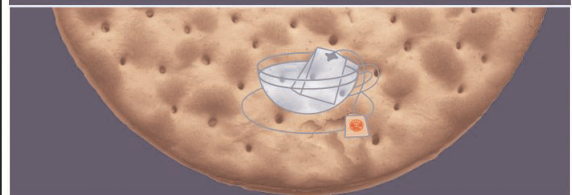
Sphere Project Module 2

### Task: concept questions

- 1 What is the relationship between the two concepts?
- 2 Why are these concepts important for humanitarian actors?
- 3 Are such concepts relevant in the context in which we operate (for example national, regional)?  
Why?

Sphere Project Module 2

### BREAK!



Sphere Project Module 2



Module 3

The Sphere Project

**The project cycle**

Sphere Project Module 3

Module 3

Session 1

The Sphere Project

**Context and the project cycle**

Sphere Project Module 3

Learning objectives

- To describe the steps in the project cycle
- To describe the factors that influence analysis in humanitarian contexts
- To demonstrate how to use the Sphere handbook to analyse the humanitarian context effectively

Sphere Project Module 3

Mitch case study

Country	Affected	Deaths	Disappeared
Guatemala	83,021	228	18
Belize	1,201,482	6,410	13,085
El Salvador	58,788	239	235
Nicaragua	807,480	3,942	3,184
Honduras	1,201,482	6,410	13,085
<b>TOTAL Central America</b>	<b>2,880,771</b>	<b>8,839</b>	<b>12,522</b>

Sphere Project Module 3

Context issues

- Economic, social, political
- Climate and geography
- Organisational
- Cultural, psychological
- Gender issues
- Human rights issues
- Societal norms and local coping capacities

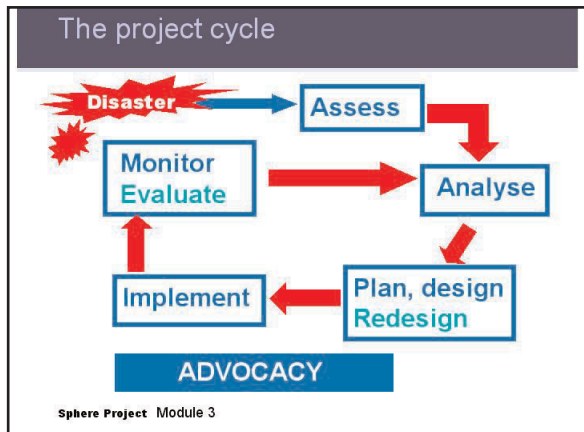
Sphere Project Module 3

Information constraints


Attempts to gather and manage data and information

- Low priority for information systems
- Low involvement
- Poor feedback to collector and community
- Quantitative bias
- Lack of skill and experience

Sphere Project Module 3



Module 3

Session 2  The Sphere Project

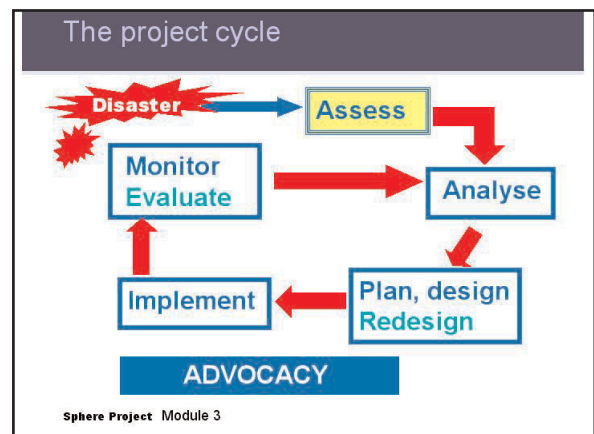
**Using Sphere in assessments**

Sphere Project Module 3

**Learning objectives**

- To define the purpose of assessment in the humanitarian response
- To define where assessment happens in the project cycle
- To describe what bias is and how it might influence assessment
- To describe how standards and checklists can enhance assessment
- To describe the role of key indicators in assessment
- To recognise that:
  - the project cycle is iterative
  - assessment is a first stage

Sphere Project Module 3



**Balancing speed and accuracy in assessments**

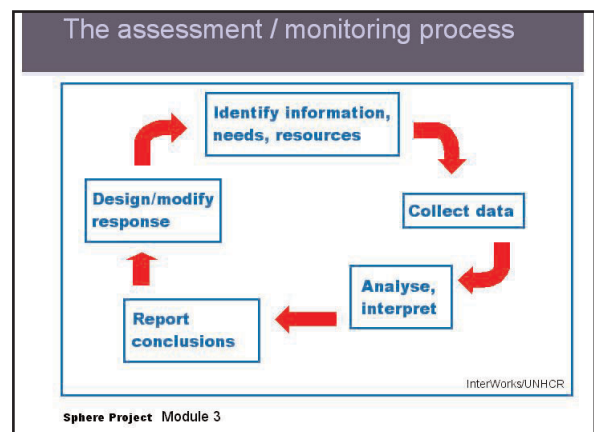
**1 SPEED**

**2 ACCURACY**

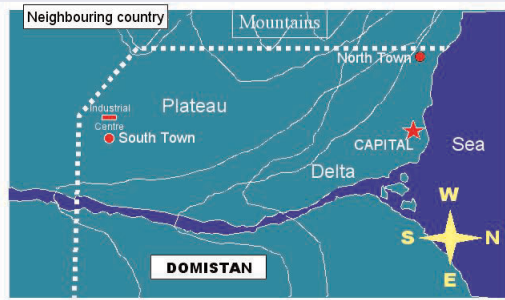
**3 UTILITY**

Utility of assessment findings =  $f$   $\frac{\text{Accuracy}}{\text{Time}}$

Sphere Project Module 3 InterWorks



### Domistan map



Sphere Project Module 3

### Common standard 2

#### Initial assessment

"Assessments provide an understanding of the emergency situation and a clear analysis of threats to life, dignity, health and livelihoods to determine, in consultation with relevant authorities whether an external intervention is required and, if so, the nature of the response."



Sphere Project Module 3

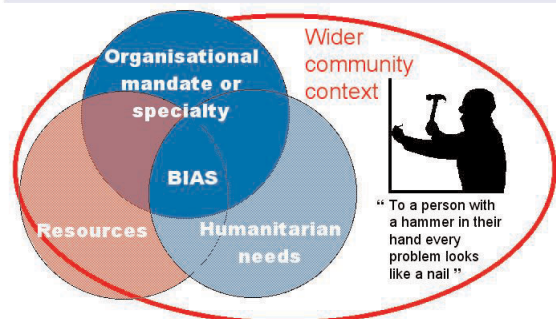
### Indicators

- 'Signals' that show whether a standard has been attained.
- They provide a way of measuring and communicating both the impact, or result, of programmes as well as the process, or methods, used.
- The indicators may be qualitative or quantitative.



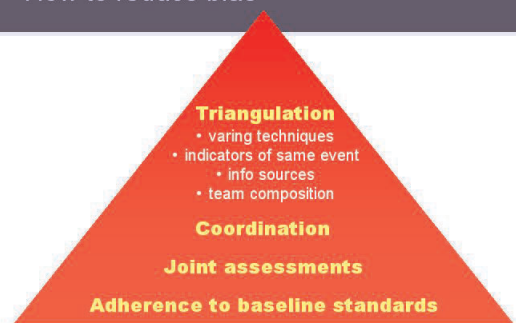
Sphere Project Module 3

### Using Sphere to mitigate bias



Sphere Project Module 3

### How to reduce bias



Sphere Project Module 3

### Assessment standards in Sphere

#### Common standard 2: initial assessment

#### Checklists for initial assessments:

- 1 Water supply, sanitation and hygiene promotion**
- 2 Food security, nutrition and food aid**
- 3 Shelter, settlement and non-food items**
- 4 Health services**

Sphere Project Module 3

### Module 3

#### Session 3



The Sphere Project

### Using Sphere in analysis

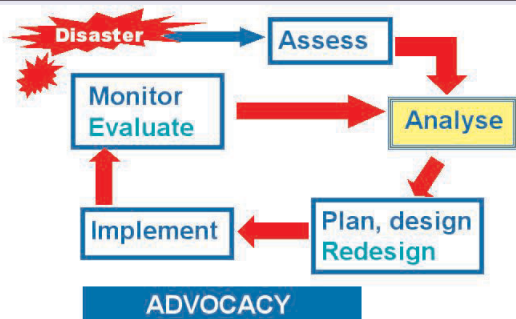
Sphere Project Module 3

### Learning objectives

- To define the purpose of analysis and where it happens in the project cycle.
- To demonstrate how to use the Sphere handbook in problem analysis.
- To define how the Sphere handbook can enhance the quality of analysis.
- Identify practical analysis techniques and tools to use with the Sphere handbook.

Sphere Project Module 3

### The project cycle



Sphere Project Module 3

### Some analytical 'lenses'

- Gaps in available resources
- Social, political and economic
- Use and control of resources
- Demographic compositions
- Technical and sectoral
- Capacities and vulnerabilities

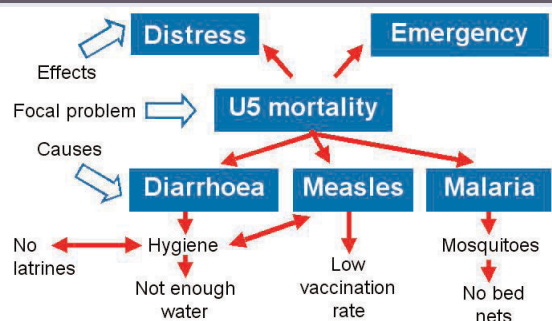
Sphere Project Module 3

### Capacity and vulnerability analysis

	Vulnerabilities	Capacities
<b>Physical/ Material</b>	Elderly people and children - difficult to get food aid	Food and income from local farming
<b>Social/ Organisational</b>	HIV / AIDS: demographic age shift	Tradition of family care
<b>Motivational/ Attitudinal</b>	Mass bereavement	Commitment to education

Sphere Project Module 3

### The problem tree



Sphere Project Module 3



### Module 3

#### Session 4



The Sphere Project

### Sphere and programme planning

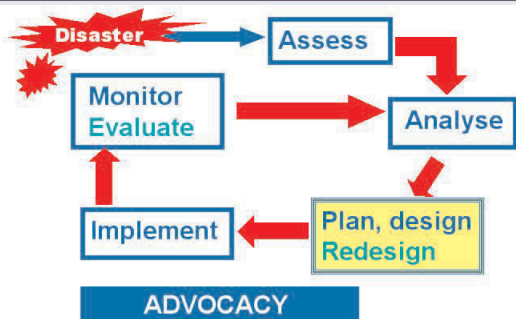
Sphere Project Module 3

### Learning objectives

- To list the key principles of project planning and identify where it happens in the project cycle
- To demonstrate how to use the Sphere handbook
  - in project planning
  - with a logical framework
- To demonstrate how to use a gap identification chart in coordinating project planning

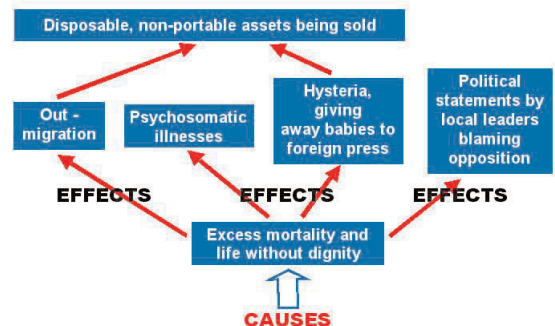
Sphere Project Module 3

### The project cycle



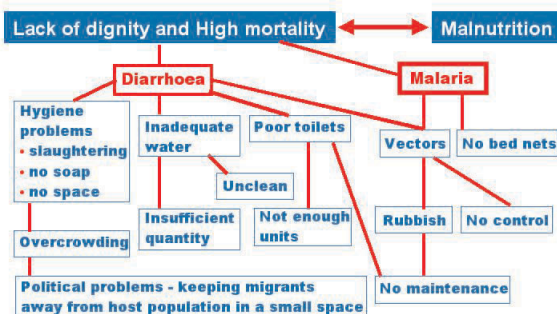
Sphere Project Module 3

### Domistan case study



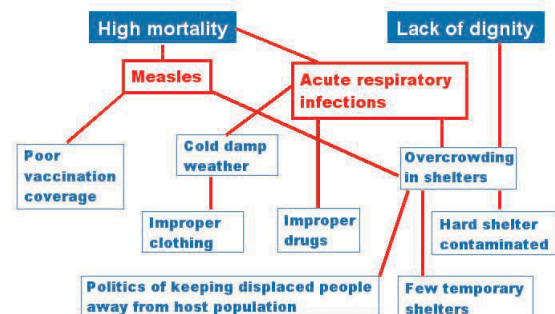
Sphere Project Module 3

### Water and sanitation problem tree



Sphere Project Module 3

### Shelter problem tree

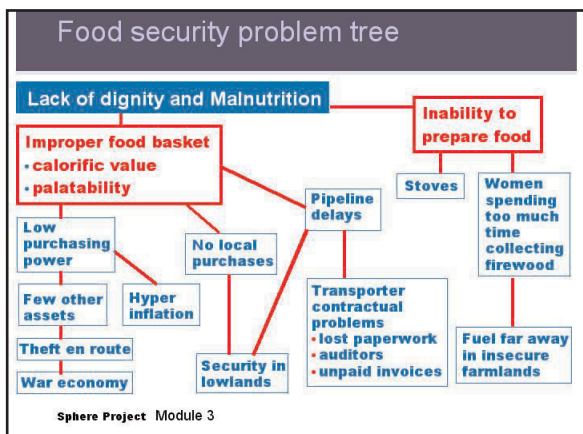
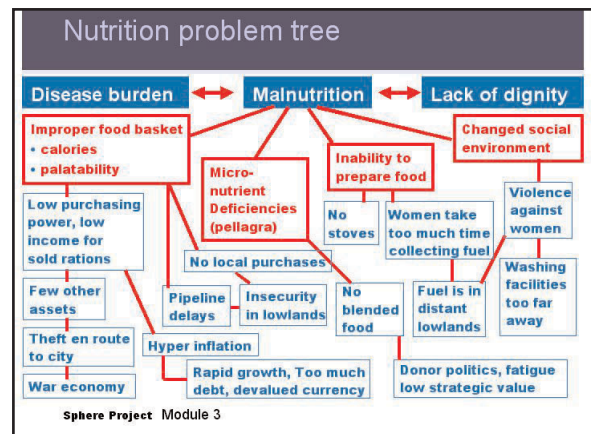
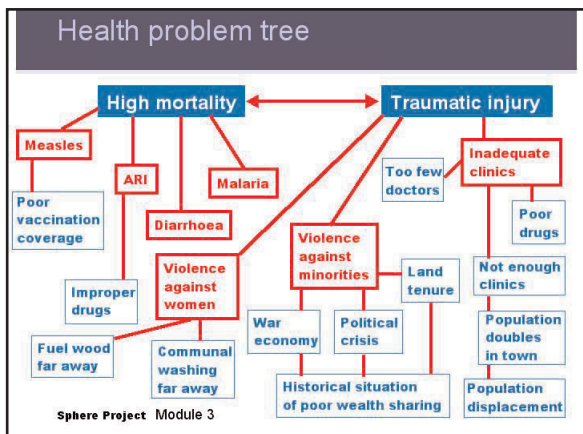


Sphere Project Module 3

## E. POWERPOINTS

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### MODULE 3: Sphere and the project cycle



**Programme planning...**

**‘Programme planning should be a **coordinated** effort to fulfil a strategy resulting in desired impacts – a life with dignity for all programme participants’**

Sphere Project Module 3

**A coordination tool**

Gap Identification Worksheet		NEEDS							
		Health	Food	Habitat	Security	Shelter	Business	Education	Training
RESOURCES	Local Community								
	State Government	✓		✓			✓		
	UNHCR				✓				
	F.O.O.D.	✓							
	Red Cross							✓	✓
	Domistani Sisters			✓				✓	
	Donor X	✓	✓						

Sphere Project Module 3

### Logical framework

	Narrative description	Objectively verifiable indicators	Sources of information	Risks, hypothesis, assumptions
<b>Impact</b>				
Effect, or outcome, or objective				
<b>Expected output</b>				
<b>Activities</b>				
<b>Inputs</b>				

Sphere Project Module 3

### Summary

- Determine activities
- Select indicator and justify
- Determine levels of response
- Clarify what programmes can achieve
- Use a common language to enable coordination

Sphere Project Module 3

### Module 3

#### Session 5



The Sphere Project

### Sphere and Monitoring and Evaluation

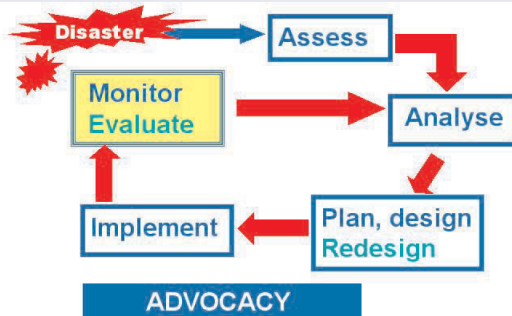
Sphere Project Module 3

### Learning objectives

- To discuss and contrast key elements of monitoring and evaluation
- To select and apply priority key indicators from the Sphere handbook to a specific project
- To describe how to set up a monitoring system for a humanitarian project
- To select, adapt and 'operationalise' indicators for a specific project
- To describe how emergency situations constrain monitoring and evaluation

Sphere Project Module 3

### The project cycle



Sphere Project Module 3

### Monitoring

**A continuous and systematic process of recording, collecting, measuring, analysing and communicating**

**information**

Sphere Project Module 3

### What information?

Progress of project implementation

Developments in the project environment

Analysis of interaction between:  
**project and environment**

Sphere Project Module 3

### Guiding principles for monitoring

- Focuses on minimal information required for each level of responsibility
- Includes all forms of communication: verbal, written, formal, informal
- Uses participatory methods
- Creates an obligation to act on operational and strategic implications of information received

Sphere Project Module 3

### Evaluation...

**Systematic and impartial examination of humanitarian action intended to draw lessons to:**

- improve policy and practice
- enhance accountability

Sphere Project Module 3

### The difference between M&E

**Monitoring and evaluation are different processes but can merge**

"There is no universal agreement as to what ground the terms monitoring, review and evaluation should cover (...). The important thing is to gain agreement on basic principles and definitions with those agencies and individuals you work with directly."

(B. Broughton & J. Hampshire)

Sphere Project Module 3

### Indicators

**"... a small set of data, ... usually easy or cost-effective to collect, highly correlated with other data, and from which much useful and trustworthy conclusions can be derived quickly."**

(UNDRO)

Sphere Project Module 3



#### Operationalise indicators

- Where will the data be collected from?
- Who will collect it?
- When will it be collected, and how frequently?
- How will the data be collected and stored?
- Who will analyse the data?
- How will it be reported?
- How will management decisions be made based on the monitoring report?

Sphere Project Module 3

#### What Sphere says about M&E

- Common standard 5: **Monitoring**
- Common standard 6: **Evaluation**

Sphere Project Module 3

#### Module 3

##### Session 6



The Sphere Project

#### Beyond the project cycle

Sphere Project Module 3

#### Learning objectives

- To list 10 critical issues facing the humanitarian system
- To identify which of those issues could be addressed by using the Sphere handbook

Sphere Project Module 3

#### 2002 ALNAP 10 performance issues

- |  |                                  |
|--|----------------------------------|
| <b>1</b> Human resources                     | <b>6</b> Gender equality         |
| <b>2</b> Preparedness                        | <b>7</b> Targeting               |
| <b>3</b> Coordination                        | <b>8</b> Relief to development   |
| <b>4</b> Participation and capacity building | <b>9</b> Protection              |
| <b>5</b> Indigenous coping strategies        | <b>10</b> Results-based planning |

Sphere Project Module 3

#### Barriers to coordination

- Competition for resources
- Threat to autonomy
- Many organisations
- Different measures of success

Sphere Project Module 3

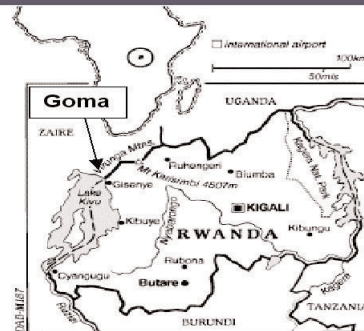
#### What is accountability?

**“ The responsibility to demonstrate to stakeholders, foremost of whom are disaster-affected people, that humanitarian assistance complies with agreed standards.”**

(Sphere 2000)

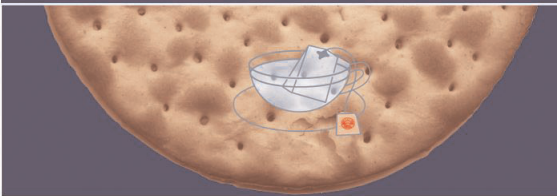
Sphere Project Module 3

#### Rwanda case study



Sphere Project Module 3

BREAK!



Sphere Project Module 3

#### Training Module 4



The Sphere Project

### Sphere and Disaster Preparedness

Sphere Project Module 4

#### Aim for Module 4

- **Analyse the basic conceptual framework related to disaster preparedness**
- **Explore how this conceptual framework relates to the Sphere handbook**



Sphere Project Module 4

#### Training Module 4

#### Session 1



The Sphere Project

### Basic concepts

Sphere Project Module 4

#### Learning objectives

- **To identify key elements of most commonly used definitions:**
  - disaster, hazard, risk, capacity and vulnerability.
- **To explain the difference between:**
  - disaster preparedness, disaster prevention and disaster mitigation.

Sphere Project Module 4

#### Assumptions

- **Populations affected by disasters have a right to:**
  - disaster assistance
  - determine the type of assistance they need
- **Disaster preparedness provides opportunities for rights-based participation**
- **Preparedness is an important step toward good quality and accountability**

Sphere Project Module 4

#### What is a disaster?

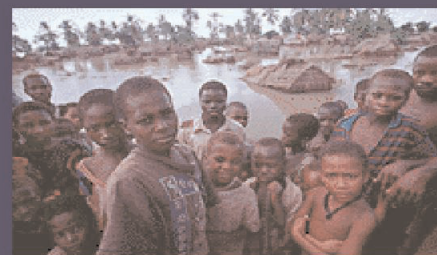


Photo: Chris Black

**Discuss common elements included in most definitions of a disaster.**

Sphere Project Module 4

#### The common elements:

- Affects people
- Usually triggered by a hazard
- Directly related to vulnerability
- Exceeds capacity of household, community or group of people to cope
- Social processes play an important role
- More to do with society than natural phenomena

Sphere Project Module 4

#### Discuss and agree

- **Hazard**
- **Risk**
- **Vulnerability**
- **Capacity**

Sphere Project Module 4

#### What is a hazard?

- A hazard is a physical or human-made event that can potentially **trigger a disaster**.
- Examples include earthquakes, mud-slides, floods, volcanic eruptions, tsunamis, drought, economic collapse, and war.
- These physical events need not necessarily result in disaster.

Sphere Project Module 4

#### What is risk?

- The probability/likelihood of a disaster happening.
- **Risk analysis** involves determining the probability of the disaster happening.

Sphere Project Module 4

#### What is capacity?

- **Capacity is the resources of individuals, households and communities to cope with a threat or resist the impact of a hazard.**
- **What capacities can be used or developed to increase people's capacity to cope?**



Sphere Project Module 4

#### What is human vulnerability?

- **Human vulnerability is:**
  - the degree to which people are **susceptible** to loss, damage, suffering and death, in the event of a disaster.
- **This is a function of:**
  - physical, economic, social, political, technical, ideological, cultural, educational, ecological and institutional conditions.
- **Vulnerability relates to:**
  - an individual's or community's capacity to cope with specific threats.

Sphere Project Module 4

### The ingredients?

$$H \times V - C = R$$

**Hazard**  $\times$  **Vulnerability** - **Capacity** = **Risk**

Sphere Project Module 4

### Hazard $\times$ Vulnerability - Capacity = Risk

<b>Hazard</b>	Potential threat to humans and their welfare
$\times$	
<b>Vulnerability</b>	Exposure and susceptibility to loss of life or dignity
-	
<b>Capacity</b>	Available and potential resources
=	
<b>Risk</b>	Probability of disaster occurrence
<b>Disaster</b>	<b>Realisation of a risk</b>

Sphere Project Module 4

### What is the difference?

- **Disaster preparedness**
- **Disaster mitigation**
- **Disaster prevention**

Sphere Project Module 4

### What is disaster preparedness?

#### Measures that ensure the readiness and ability of a society to:

- forecast and take precautionary measures in advance of an imminent threat
- respond to and cope with disaster effects by organising and delivering timely and effective assistance.

**Participation is essential at all stages**

Sphere Project Module 4

### Examples of preparedness activities

- Develop and test early warning systems
- Make evacuation plans
- Establish policies
- Make operational plans
- Secure resources
- Training



Sphere Project Module 4

### Prevention, mitigation and preparedness

<b>Disaster prevention</b>	<b>Disaster mitigation</b>	<b>Disaster preparedness</b>
Activities designed to provide <b>permanent protection</b> from disasters.	Measures taken in advance of a disaster aimed at <b>reducing</b> its impact on society and the environment.	Ability to <b>predict, respond to and cope</b> with the effect of a disaster.

Sphere Project Module 4



### Disaster prevention and mitigation

- Prevention aims to eliminate risk.
- Mitigation aims to reduce risk.
- Appropriate disaster prevention and mitigation
  - 'builds on people's strengths and tackles the causes of vulnerability'

Community empowerment and the right to participate are central to good preparedness and mitigation.



Sphere Project Module 4

### Mitigation: How risks can be reduced

#### Hazard reduction

- Constructing flood protection
- Improving drainage
- Reinforcing hill-sides
- Eliminating the principal site of an infection.

#### Vulnerability reduction

- Seismic resistant construction
- Micro-seismic studies to predict vulnerable areas
- Relocating from river banks
- Improving health and nutrition
- Vaccination.

Sphere Project Module 4

### Module 4

#### Session 2



The Sphere Project

### Disaster preparedness case study

Sphere Project Module 4

### Learning objectives

- To describe how to apply the Sphere handbook as a planning benchmark in disaster preparedness planning.
- To explain how the Humanitarian Charter and its emphasis on participation has direct relevance to disaster preparedness.

Sphere Project Module 4

### Case study: Domistan

- Design a disaster preparedness initiative.
- Present your initiative to a group of donors to "fund" this initiative.
- Use the handbook as much as you can.

Sphere Project Module 4

### The Humanitarian Charter

**Humanitarian Imperative:** "By this we mean that all possible steps should be taken to **prevent** or **alleviate** human suffering...."

**"We understand an individual's right to life to entail the right to have steps taken to preserve life where it is threatened, and a corresponding duty on others to take such steps."**

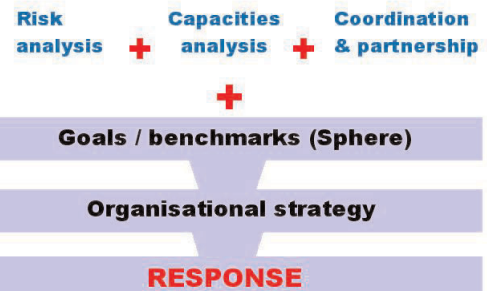
Sphere Project Module 4

### Conclusions



Sphere Project Module 4

### Basic disaster preparedness



Sphere Project Module 4

### Applying Sphere to disaster preparedness

If a good response requires standards then preparedness measures need to consider these standards.

**Sphere is directly relevant to**

- 1 Process of preparedness**  
(participation and coordination)
- 2 Product of preparedness**  
(concrete preparedness measures)

Sphere Project Module 4

### Module 4



The Sphere Project

### Optional toolkit

Sphere Project Module 4

### Optional case study

- **Give five specific examples of relevant standards to deal with this type of situation in the future**  
- give references from the handbook.
- **List three major planning and coordination issues that affect the response**  
- provide recommendations on how to improve from previous experience.
- **List four ways to mitigate or reduce the severity of a future disaster.**
- **Explain how people at risk can participate in these initiatives.**

Sphere Project Module 4

### Emergency preparedness

- **Emergency preparedness is the readiness of a society to confront a potential disaster.**
- **All actions taken in order for people and organisations to be ready to react and respond to a disaster situation.**



Photo: Chris Blak

Sphere Project Module 4

## E. POWERPOINTS

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## MODULE 4: Sphere and disaster preparedness

### Risk analysis - who should be involved?

**The steps in a good risk analysis involve communities organising to:**

#### Identify and measure

- hazards
- vulnerability
- capacities

**Act or demand action to reduce vulnerabilities and hazards**



Photo: Chris Black

Sphere Project Module 4

### A simple risk analysis tool

Disaster	A Hazard	B Vulnerability	C Probability	D Historical	Total risk (A+B+C+D)
Earthquake	1	3	1	1	6
Drought					
Civil					
Emergency					
Flood					
Cyclone					
Wind storm					
Snow storm					
Chemical spill					
Biological					
Tornado					
Tidal wave					
Mud slide					
Transport					

Sphere Project Module 4

### Capacity and vulnerability analysis (CVA)

- **Who will need what?**
- **Who can provide what?**
- **Vulnerability analysis counter-balanced through 'capacity analysis'.**
- **Every community has capacities.**
- **Mitigation and preparedness builds on both.**
- **Sphere is based on the principle of capacity recognition and the various roles of response organisations.**

Sphere Project Module 4

### Capacity and vulnerability analysis

	Vulnerabilities	Capacities
<b>Physical/ Material</b>	Elderly people and children - difficult to get food aid	Food and income from local farming
<b>Social/ Organisational</b>	HIV / AIDS: demographic age shift	Tradition of family care
<b>Motivational/ Attitudinal</b>	Mass bereavement	Commitment to education

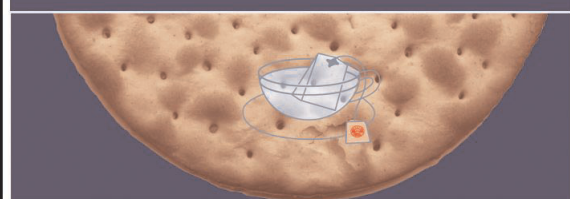
Sphere Project Module 4

### Disaster management



Sphere Project Module 4

### BREAK!



Sphere Project Module 4



## F. RESOURCES

113

Use this section to:

- ▶ review the resources and references used in each Module
- ▶ identify useful sources of information and support

<b>MODULE 1 Introduction to Sphere</b>	<b>108</b>
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<b>MODULE 2 The Humanitarian Charter</b>	<b>108</b>
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<b>MODULE 3 Sphere and the project cycle</b>	<b>109</b>
--	------------

<b>MODULE 4 Sphere and disaster preparedness</b>	<b>110</b>
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**[www.sphereproject.org](http://www.sphereproject.org)**

A wide range of support, including reports for donors and management committee contacts.

### MODULE 2

#### Online

- ▶ **Crimes of War** [www.crimesofwar.org](http://www.crimesofwar.org)
- ▶ **The Global IDP Project - training programme** [www.idpproject.org](http://www.idpproject.org)
- ▶ **International Committee of the Red Cross – ICRC** [www.icrc.org](http://www.icrc.org)
- ▶ **Reach Out – A refugee protection training project.** [www.reachout.ch](http://www.reachout.ch)
- ▶ **UNICEF – Humanitarian principles training**  
<http://coe-dmha.org/unicef/unicef2fs.htm>
- ▶ **United Nations High Commissioner for Human Rights**  
[www.unhchr.ch](http://www.unhchr.ch) [Please check]
- ▶ **United Nations High Commissioner for Refugees – UNHCR**  
[www.unhcr.ch](http://www.unhcr.ch)

#### Training resource databases

- ▶ **Humanitarian Assistance Training Inventory – HATI** – [www.reliefweb.int](http://www.reliefweb.int)
- ▶ **InterAction humanitarian training database** – [www.interaction.org](http://www.interaction.org)

#### Other

##### **Benefits Harms**

A rights based approach training programme

Cooperative for Assistance and Relief Everywhere (CARE) (2001)

Contact Paul O'Brien, Africa Policy Advisor - [Pobrien@care.org](mailto:Pobrien@care.org)

##### **Guiding Principles on Internal Displacement**

United Nations Office for Coordination of Humanitarian Affairs. [www.unocha.org](http://www.unocha.org)

##### **Human Rights and International Legal Standards: What do Relief Workers Need to Know?**

By James Darcey, Humanitarian Practice Network Paper 17. [www.odihpn.org](http://www.odihpn.org)

##### **Learning about Rights**

Modules on rights and humanitarian standards in emergencies by ActionAid.

[L.morago@actionaid.org](mailto:L.morago@actionaid.org)

##### **Politics and Humanitarian Aid: Debates, Dilemmas and Dissension**

Report of a conference in London on 1 Feb, 2002. HPG report 10 (April 2001)

##### **Protecting Refugees – A Field Guide for NGOs**

United Nations Publications ISBN 92-1-101005-5

**Protection in Practice: Field-level Strategies for Protecting Civilians from Deliberate Harm**

By Diane Paul, HPN network paper 30 (July 1999) [www.odihpn.org](http://www.odihpn.org)

**Strengthening Protection in War: A Search for Professional Standards**

Workshops at the ICRC, 1996-2000. ICRC Central Tracing Agency and Protection Division

**Taking Duties Seriously: Individual Duties in International Human Rights Law**

International Council on Human Rights Policy ISBN: 2-940259-00-3

**The UN and Refugees' Human Rights – A Manual on how UN Human Rights Mechanisms can Protect the Rights of Refugees**

Amnesty International ISBN 0-86210-271-5

**Under the Sheltering Tree**

IASC (Interagency Standing Committee) - Protecting Human Rights Through Humanitarian Action

**World Disasters Report 2003: Focus on Ethics in Aid**

International Federation of Red Cross and Red Crescent Societies ISBN: 92-9139-092-5

### MODULE 3

**A Basic Guide to Evaluation for Development Workers**

By Frances Rubin, Oxfam (1998)

**A Practical Guide to Assessment, Monitoring, Review and Evaluation Toolkits**

Save The Children (1995)

**Assessing the Impact of Interventions in Emergency Situations**

By Elsa L. Dawson (February 1998)

**Bridging The Gap: A Guide to Monitoring and Evaluating Development Projects**

By B. Broughton and J. Hampshire, ACFOA (1997) [acfoa@acfoa.asn.au](mailto:acfoa@acfoa.asn.au),

**Do No Harm: How aid can support peace - or war**

By Mary B. Anderson (1990)

ISBN 1-55587-834-2

**Evaluation Conjointe de l'Aide d'Urgence au Rwanda : Conclusions et Recommandations Principales de l'Etude III, Dossier thématique N° 16**

By John Borton, Overseas Development Institute, Réseau Aide d'Urgence et Réhabilitation, Londres (1996) [rrn@odi.org.uk](mailto:rrn@odi.org.uk)

**Evaluating Humanitarian Assistance Programmes in Complex Emergencies, Good Practice Review No.7** Overseas Development Institute, London [www.odi.org.uk](http://www.odi.org.uk)

By Alistair Hallam (September 1998)

**Evaluating the International Humanitarian System in Disasters, Volume 20, N°4**

By Niels Dabelstein (1996)

**Field Operations Guide**

USAID (1998)

**Learning for Change: Principles and Practices of Learning Organisations**

By Bruce Britton, Swedish Mission Council (2002)

**Monitoring in MSF: Introduction and Tools**

MSF Amsterdam (April 1999)

### MODULE 4

**Disaster Management Training Programme: Overview of Disaster Management, 2nd edition**  
UNDP (1992)

**Disaster Management Training Programme: Introduction to Hazards**

University of Wisconsin (Editorial services by InterWorks) UNDP(1997)

**Disaster Management Training Programme: Contingency Planning, 2nd edition**

UNDP (1992)

**Oxfam Handbook**

Vol. 2, PP 833-836, Oxfam Publishing

**Reducing Risk: Participatory Activities for Disaster Mitigation in Southern Africa**

By Ailsa Holloway and Astrid Von Kotze, University of Natal and IFRC, Oxfam Publishing (1996)

#### FINAL NOTE

We tried very hard to include an Index in this Training Package. Unfortunately this was not possible. However please note that you can do various searches on the CD.

► It's right over there.

# Sphere Training Package

*The Sphere training modules provide essential building blocks for humanitarian training. They can be used in sequence to teach fundamentals of humanitarian practice. Sessions also stand alone and can be integrated into other training. A solid source for emergency, development and advocacy work across the humanitarian spectrum. An excellent resource, essential for anybody carrying out humanitarian training. The diversity of training techniques allows for engaging learning.*

Mark Prasopa-Plaizier  
**Humanitarian Training Manager. RedR Australia**

*Sphere training has been instrumental in assisting ACFOA members to improve program effectiveness and organisational accountability to the people they undertake to assist. ACFOA members committed to rights-based programming have used Sphere training to translate the theory of human rights into an operational reality.*

Jenny Wells  
**Program Coordinator. Australian CFOA**

*The training materials were very useful when I was organising a National Workshop in Kenya. We decided on the objectives of the workshop and adapted the training materials to fit in with what we wanted to achieve – it was good to know that a lot of the research had already been done. We also adapted the modules to our own context, inserting case studies that were appropriate to Kenya – to me, this sums up the essence of Sphere – that it is a tool to be used and adapted to the context in which you are working.*

*The Modules have been designed by experienced trainers and the methods suggested are a product of the lessons learned from many different workshops. No re-inventing the wheel required! A wide variety of training techniques are given, which keeps the workshop dynamic – the participants on our most recent workshop really appreciated this and used the methods to feed back each morning.*

Lindy Montgomery  
**Humanitarian Programme Coordinator, Kenya Programme, Oxfam GB.**



## The Sphere Project

Humanitarian Charter and Minimum Standards in Disaster Response

This Trainers' Guide and CD are a part of the Sphere Training Package (ISBN 0 85598 509 7) and are not available separately.