

Supporting reforms in public administration

HOW TO BE A BETTER POLICY ADVISOR?

Manual for trainers

Edited by Ieva Lazareviciute



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Published by NISPAcee



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Administration in Central and Eastern Europe

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Edited by Ieva Lazareviciute

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Other publication in this project:

"How to be a better policy advisor?", Manual for advisors

Written by Miroslaw Grochowski and Michal Ben-Gera

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The training programme that serves as the basis for this manual was designed by a team of trainers and tested in four regional training events held in Almaty, Kazakhstan (2001), Bratislava, Slovakia (2001), Cluj-Napoca, Romania (2002) and Odessa, Ukraine (2002).

The team would like to express its gratitude to all those who provided their advice and input. And above all, to the participants of the pilot training events, who have helped the team in refining the materials and exercises to suit the current needs and priorities of the advisors working with the governments throughout the post-Soviet region.

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Introduction

Advisory services are not a recent invention. The tribal priests were the prototype of modern-day advisors - the second most influential institution in the tribe advising leaders at critical moments. It was the priests who searched for the various omens or voices that would indicate whether the coming year will be good for hunting or not, which way the tribe should move in order to find prey, and what will bring a coveted victory over rival tribes.

Later came the time for the astronomers to search the stars and to help the heads of states to choose the right time for the right decisions. Finally in the late 19th century the first modern think tanks emerged and began providing policy advice to prime ministers and presidents on the basis of more rational assessments and calculations (Parsons, 1996).

Today the decision-makers have many various sources of advice: technocratic and political, internal and external, private and non-governmental, local or international. In most systems, legislators and administrators supplement internal advice with various forms of external assistance, primarily paid advisors. The main reasons for this are:

- The complex and specialised nature of modern policy, which means that the government often does not have all the knowledge and specialised expertise internally, and must rely on outside sources.
- The continuing pressure on governments to reduce the size of the administration to save resources (such as analytical and research resources) leads administrative organisations to seek alternative sources of information and advice.
- The focus of policy and legislation efforts shifts over time from one area to another. This means that policy workload is uneven within institutions, as is the need for resources. At times of heavy pressure in a specific policy area, there is a need to supplement resources on a temporary basis.
- Some aspects of policy-making process may require objectivity or independence that would be difficult to achieve within the administration. This is often the case, for example, with an evaluation that's intended to assess how well the administration is performing current tasks. In such cases, external advisors are almost always the only solution.
- In addition, there are specific institutional reasons why outside help is sometimes preferred to existing internal resources, e.g., the Minister might feel that the administration is not taking his political concerns into account, or there may be internal struggles between departments that can be eased with the presence of outsiders.

The NISPAcee experts that developed the "How to Be a Better Advisor" handbook carried out a short survey providing some interesting insights into the realities of policy-making in the region. Advice that government officials receive today comes from several sources:

- Policy advisors within the administration
- Civil servants
- Think tanks
- Party-political advisors
- Academia

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However, the public officials indicated in the survey that academia is the least important source of advice. Why is that? Academics are people who have made the search for information and its analysis their profession. They are people with a wealth of information on various aspects of the issues. The academics are specifically trained to understand facts, to point to trends and to draw conclusions. So what are the reasons for the relatively low numbers of academic advisors working with policy-makers?

The main complaint public officials expressed with respect to academic advisors is that the academics are mainly interested in testing their hypotheses – a task that is useful for the advancement of the science, but the results of which are hardly ever applicable in practice. Therefore, this advice is of little use to public officials. Meanwhile, the academics think that public officials are just too practice-oriented and afraid of innovations in trying to understand the importance and usefulness of academic research and its results.

The question remains whether the situation can be changed, whether anything could be done to build bridges between the academics and the practitioners of public administration? We believe that a specially-designed training may help academics to better prepare themselves for interactions with the government officials. The training will help them to develop a product that meets the needs of the practitioners and to provide them with advice on how to market themselves and their services to the policy-makers.

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How to use this manual?

How to use this manual?

This training manual is addressed to the trainers and training organisations that are interested in organising advisory training courses for academics. The manual is a supplement to the handbook for advisors “How to Be a Better Policy Advisor” and is developed with the support of the UNDP Regional Bureau for European Countries Regional Support Centre.

The trainers should treat this publication as a source of suggestions and ideas. It provides a training framework complete with summarised key information, descriptions of practical exercises, notes for the trainers as well as handouts that can be used in the training events. At the end of the manual, a suggested training programme for a 3.5-day event is included.

However, it is up to the trainers to choose the specific topics and exercises on the basis of the needs of the specific audiences they are training. An assessment of the advisory experience and the needs and expectations for the training should become a basis for the design of each training event. On the basis of submitted applications as well as additional questionnaires (if needed), the trainers can establish what their trainees already know and what falls under “must know” and “should know” categories.

Learning targets

The training should challenge the participants, however it should not overburden them with information that is too far beyond their current levels of expertise. Only the right choice of approach and content will produce desired training results – better-qualified and self-confident advisors ready to begin working with the public officials.

However there are some general rules that are recommended to the trainers using this manual:

- Lectures and exercises in most cases are designed to complement each other, therefore when designing a training event the trainer should make sure that the order of exercises and lectures remains as presented here.
- Each day should begin with a reflection exercise and the review of the contract drawn up in the beginning of the seminar.
- It is advisable to focus on the lecture type activities in the morning and to leave role-plays and case studies for the afternoons.
- The trainers should try to strike the balance between lecturing and exercises. Too much of one or the other may result in a loss of attention and lower levels of learning capacities among the trainees.
- All exercises have their purpose and it is up to the trainer to make sure that the trainees leave the classroom with a clear understanding of how each assignment and activity contributed to their learning. The trainer should summarise the results of each exercise and show how they relate to the previous or subsequent lecture/topic.
- The seminar should finish in a discussion of the training results and identification of the ways for further professional development of the trainees. Whether this is done orally or using the self-development plan again is up to the trainer, however it is essential to allow the participants some time for reflection on this topic.

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1. Topic "Beginning the training"

1. Topic "Beginning the training"

1.1 Exercise "Introduction and expectations"

The purpose of this initial session is to provide both the trainees and the trainers to become comfortable with each other and to establish the main rules of work. This part deserves adequate attention as it may very well define the course of the whole training event. After all, this is the time to discuss the expectations of the trainees and the trainers and to agree on the overall framework. Finally the introductory part gives an opportunity for the trainers to clarify the level of knowledge in the audience and on the basis of this evaluation to modify the programme ahead in order to achieve the desired effects.

This part includes two exercises:

- Exercise "Introduction and expectations"
- Exercise "Contract"

Duration: 45-55 minutes

Materials and equipment: flipchart sheets, coloured markers, adhesive paper (or other means to fasten the paper to the wall), name tags.

Purpose: The purpose of this exercise is to provide an opportunity for the trainees and the trainers to meet and discuss training aims and objectives, plus the objectives of the trainers and the expectations of the trainees. The exercise on the one hand allows the trainers to set out the framework for the training; and on the other to find out what is the level of experience of the participants as well as the needs of the specific audience.

Method: Drawings and presentations answering questions:

- Who am I?
- What I do?
- Where do I come from?
- What do I expect from this training?

The trainers should participate in this exercise alongside the trainees and present their own plans for the training event either in the middle of the exercise or as a summary at the conclusion.

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1.2 Exercise "Contract"

Duration: 25 minutes

Materials and equipment: flipchart sheets, coloured markers, adhesive paper (or other means to fasten the flipcharts to the wall)

Purpose: The purpose of this exercise is to establish common rules of work and communication while in the room, clearly defining what will be acceptable and unacceptable behaviour for this particular group throughout the duration of the training.

Method: Facilitated discussion. The trainees are asked to suggest the rules of behaviour, which are then discussed with everyone, and those acceptable to all are put on a list that is placed at the front of the room throughout the training course. Every day the participants together with the trainers should revisit the contract and add/ eliminate some entries based on the consensual decision of all in attendance.

DO NOT forget to include amusing details in the contract in order to make the whole process less formal.

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2. Topic “The Policy Process”

The purpose of all lectures and exercises on this topic included in this manual is to build awareness among the participants of the complexity of policy-making processes as well as potential roles for the external advisors in relatively closed and centralised post-Soviet decision-making systems. The analysis of these issues also leads to the discussion of the specific skills that the advisor needs in their work and provides the framework for the exchange of experiences among the participants.

Although the training event doesn't necessarily have to start from an in-depth discussion on the product, it's worthwhile concentrating the first trainer input on the policy framework, simply to establish the point of reference for further work.

This manual includes three lectures on policy cycle, potential inputs of the advisors as well as the specific features of applied policy research. However if there is such a need short lectures (5-8 min.) can be delivered on the skills of advisor (see below) as well as analytical methods (see annex of the main manual). The lectures provided here are accompanied by the exercises designed to facilitate active learning and experience exchange among the participants. The following combination of one lecture and two exercises are suggested:

- Exercise “What do we know about advising?”
- Lecture “Policy cycle”
- Exercise “Placing experiences in the cycle”

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2.1 Exercise “What do we know about advising?”

Duration: 15 minutes. Be careful with this exercise because it may be time-consuming.

Materials and equipment: Colourful stickers, flipchart sheets, adhesive paper (alternative), coloured markers

Purpose: The purpose of this exercise is to get the participants to define their experiences in advising the governments. Experiences formulated by the participants will be used for further analysis and exercises that illustrate the role of the advisor, the problems the advisor faces and solution strategies.

Method: The participants take stickers each and write down their experiences (1-2) on separate pieces in 2-3 words. Once ready the participants one by one place the stickers on a blank sheet of the flipchart. It's also useful to ask them to read out their experiences and explain the background, as a short description is often not enough to show the essence of their work, and clarity will be needed at a later stage when placing the experiences of the participants in the policy cycle.

We strongly advise to do this part prior to all the other exercises as not only it is part of “getting-to-know-each-other-better” but it is very important for you as a trainer to get a feeling of the level of knowledge and experience of your audience. Do it yourself first to demonstrate how the assignment should be carried out. Read out the type of experience and ask the audience for reactions as to which stage in the policy cycle they think that particular policy advice experience belongs. You do not have to do it with every single experience. Pick the most representative ones and stop this exercise when you feel that the audience understands the “realness” of the cycle.

The information can be used for future exercises and links the experience of the participants with the more theoretical parts of the training. Thus, it can be used for bringing the policy cycle closer to the real experience of your trainees and enable linking the experience gained from the poster to the policy cycle.

Alternative approach:

Method: Brainstorming. The trainer asks the participants to suggest the words that first come to the minds of the participants when hearing the word “Advisor”. The trainers record the ideas on the flipchart sheets. Once the list of ideas is finalised the trainees select three main ideas (each trainee has three votes). Discuss selected ideas with all the participants.

2.2 Lecture “Policy cycle”

Estimated duration: 25 minutes

Materials and equipment: pre-made poster of a policy cycle from the appendix of the main manual, coloured stickers, colourful markers

Method: brainstorming, lecture, class discussion

Notes for the trainers: This lecture is the key introductory lecture that should provide conceptual basis for the whole training event and identify the focus of the subsequent training exercises. Therefore the trainer should give adequate attention to the preparation of this lecture and adaptation of its contents to the needs of the particular audience they’re with. This information can be obtained either during the selection period or during introductory exercise by including questions targeted to provoke the participants to demonstrate their experience and knowledge on the subject.

Experience of the four pilot training seminars shows that the scheme presented in the annex of the manual “How to be a better policy advisor” is better suited for the purposes of this training. It is the more conventional approach and easier to use in the exercises. However here both the scheme from the main text of the advisory manual and the one from the annexes are presented and it is up to the trainer to choose which one is appropriate for the specific audience.

Most scholars in Central Europe are familiar with the scheme, however there still are those who are not. This concerns those academics that work on specific sector issues, such as public finances, economy, or others rather than the more general public management/ public policy issues. Therefore the trainers should assess the level of knowledge very carefully and adapt the lecture accordingly. Even if some of the participants know the policy cycle and related issues well, it’s worthwhile covering the main concepts both for the sake of specialists in the audience and to establish the general framework.

Key points:

Cyclical nature of government decision-making

It is convenient to look at the government decision-making process as beginning with a policy decision. But a successful policy process is a cycle, because lessons learned from the implementation of a policy or legislative instrument are then incorporated back into the process, and give rise either to new policy decisions or additional policy development to modify the present instrument. Of course, in order for lessons to be derived and re-incorporated into the cycle, there has to be a conscious process of monitoring and evaluation.

The trainer may mention that the stages identified in the policy cycle presented are model ones and there might be more or fewer stages than those; and most importantly, they do overlap.

The problem-solving nature of policy-making

The legacy of the past is that the decision-makers and other participants in the policy making omit the most important reason for making a certain policy: to solve a problem existing in a society. Too often, it happens that a certain law is developed because the previous one is ‘too obsolete’ or the EU requires complying with certain standards. Even if this is the case the advisors should always bear in mind how the new policy (law or programme) may be adapted to local conditions in order to solve the problem. Therefore, the problem icon is in the centre of the policy cycle because all stages have to be tested against this original intention. You should try to point out this key feature of the policy making. Give examples...

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The ways advisors may assist government officials: outputs of advising

Written:

- Reports
- Policy papers;
- Draft legislation;
- Background study;
- Implementation strategy;
- Reviews and comments on other documents;
- Communication strategy, and
- Evaluation of a program

Oral:

- Typically presentations of various styles and level of formality,
- Verbal consultations

Events:

- Conferences;
- Brainstorming session;
- Debates, working groups on a particular topic, and
- Training.

Needed skills

The list includes: project planning and design, general expertise (local and comparative) in the policy and legislative cycle, research and analytical skills, organisational expertise, legal expertise including drafting, knowledge of impact assessment including cost-benefit analysis, training skills, and communications and consultation skills. Subject-matter expertise (e.g., understanding of civil service matters is useful for assisting in planning the project to develop new civil service legislation) is also needed.

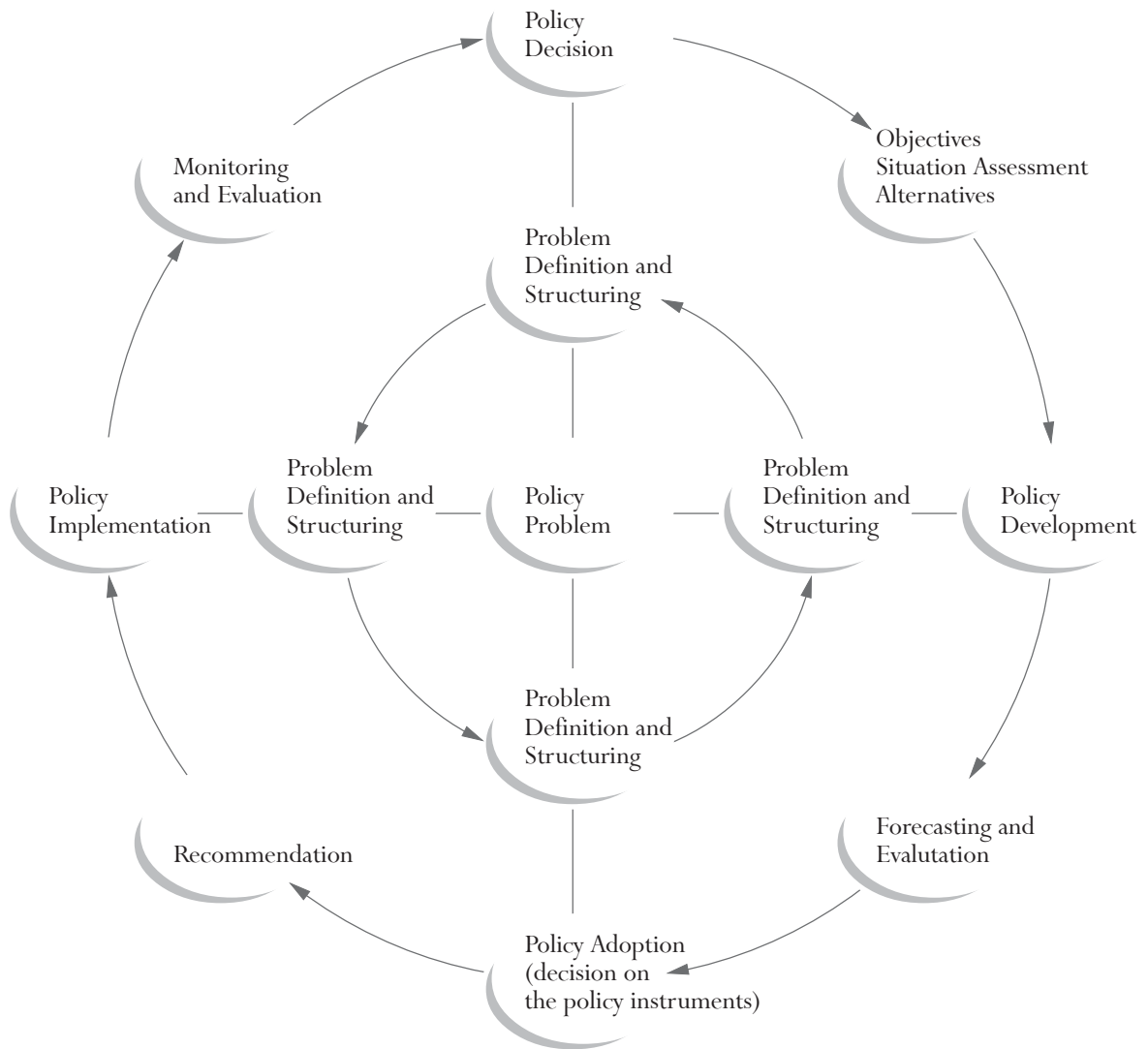
As well as that, a good sense of ethics, an ability to make independent assessments, objectivity and at the same time decisiveness to use subjective judgement and, finally, the flexibility needed to deal with the various parts of the government.

Description of the policy and legislation cycle

It is useful to begin with a brief discussion of the policy and legislative process in order to establish where, when, and how advisors can be most valuable to government and the administration, and where advisors could have the greatest number of opportunities.

Furthermore, the scheme used for the presentation is a theoretical one that tries to highlight certain features of the policy-making process. Therefore, it is advisable for the trainers to prepare practical examples and link the framework to the actual policy process.

Policy cycle as used in the manual (p. 26)



References: Manual "How to be a better policy advisor" pages 17-34.

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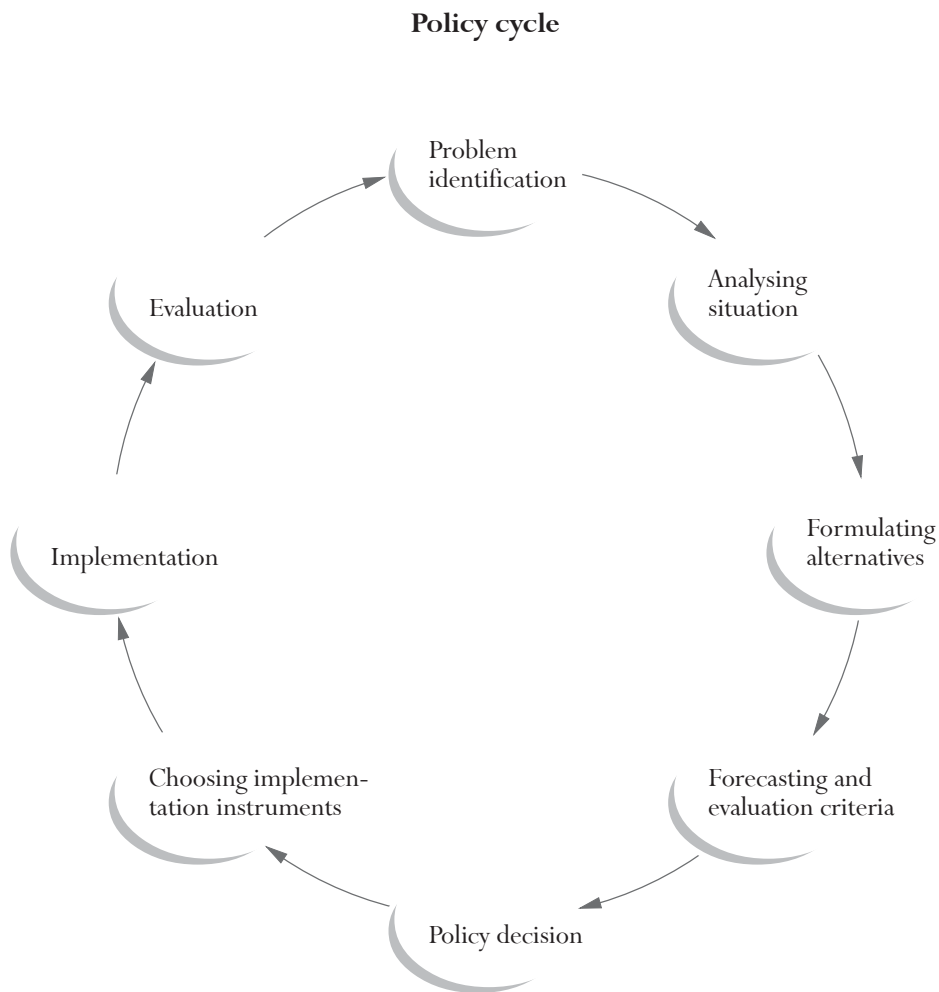
2.3 Exercise "Assigning experiences a place in the cycle"

Duration: 20-30 minutes, depending on the participants' level of experience

Materials and equipment: Pre-made poster of the policy cycle, previously-prepared stickers with the experiences of the participants.

Purpose: This exercise analyses the experiences of the participants defined during the previous exercise and establishes a connection between the background of the participants and the practice of policy-making.

Method: The participants take their description of the experience and place it at an appropriate place on the drawing of a policy cycle, explaining why the place for their experience belongs there. Information on who the recipient was should be provided, plus what the essence of the advice was and what methods were used.



3. Topic “The Product”

The product of the work of the advisor is the main reason why government officials invite advisors from the outside. Policy-makers are interested in information that helps them make up their minds about the alternative courses of action available – and is presented in a way that makes it easy to use in the decision-making process.

The quality of the product is likely to be the main reason why the advisor is or is not invited to work for the public institution again. (The advisor should be aware that other reasons might prompt the official to seek the services of an advisor. These may range from genuine interest in adopting sound policies to a desire to secure a scapegoat when explaining his/her decisions in case of failure. Thus the advisor should clarify the true intentions of the potential client in order to avoid unpleasant surprises.) Therefore the advisor should focus on delivering as good a product as possible. For even if the advisor is politically, personally and otherwise attractive to public managers, they will be more inclined to hire an advisor that is able to provide high quality advice and has proven that with their previous work.

There are three blocks of lectures and exercises included under this topic. The last lecture can be delivered individually, without complementary exercise:

- Lecture “The process of advising”
- Discussion “Types of the product”
- Lecture “What a policy paper is?”
- Case “Bad policy paper”
- Case “The Triffid case”
- Discussion (or short lecture) “Differences between academic and policy research”
- Lecture “Information gathering: methods and techniques”

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3.1 Lecture “The process of advising”

Estimated duration: 10-15 minutes

Materials and equipment: Handout “advice plan vs. research plan”, overhead projector or multimedia projector

Method: lecture, questions & answers

Notes for the trainers: The purpose of this lecture is to introduce the participants to the various aspects of the advisory process and thus to help them to better plan their steps as advisors.

The usual advice to the government officials working on public administration reform design is to assess all important and not-so-important factors, carefully plan all steps of the reform, and always forecast the effects of their actions. The same advice can be given to the advisors. The process of developing the advice cannot be haphazard. Each step has to be considered and adapted to the specific situation, the specific client and their needs.

Key points:

Besides the gathering and analysis of the data and the generation of policy ideas, the advisory process involves other preparatory and advice delivery-related aspects:

- Building relationship with the client
- Knowing client’s environment
- Knowing the needs of the client
- Preparing the plan for advising
- Advising project proposal and its elements

References: Manual “How to be a better policy advisor” pages 57-64

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Handout "Log frame matrix"

	Narrative Summary	Performance Indicators	Monitoring and Evaluation	Important Assumptions
Goals				
Purpose				
Outputs				
Activities				

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Handout "Advice Plan vs. Research Plan"

What should be in an advisory project plan?

- Aims and objectives of the advice
- Activities with carefully and precisely planned schedule; contributors
- Outputs, deliverables
- Reporting and evaluation
- Budget

Timeframe:

- Short terms (frequently only few weeks or even few days)
- Strictly and precisely planned
- Always expect the unexpected – plan realistically
- If you are late, you failed.

Sources of information:

- Reliance on existing pieces of information
- Active reliance on qualitative, frequently subjective information (as opposed to objective, qualitative information)
- Reliance on government databases – secure with the client that you get it, and be prepared for not getting it
- Deal with confidentiality
- Getting information (via interviews, etc.) may also be a form of contacting and/or keeping relationship with client(s)

Methodology

- Much less relevant than in research – does not have to be as fully elaborated
- Deliverables
- Do not forget that this is THE PRODUCT!
- Plan in detail and precisely.
- There may be several deliverables so that the client sees that the projects go on and can expect some useful information on time, before the end of project

Typical, most important parts of a report:

- Executive summary: If the document is longer than five pages, an executive summary at the beginning of the report is called for. Usually it contains the main conclusions and recommendations (possibly the main options)
- Description of the background – show how you understand (and that you understand the issue) it
- Main findings, their relevance and “meaning”
- Conclusions (if applicable)
- Recommendations perhaps to be shown as “options for solution” rather than as definite solutions. Provide information explaining why these are the recommendations

Is continuous (but not burdensome!) communication with client planned?

3.2 Case study “Advice vs. research”

Duration: 2-2.5 hours (120-150 minutes with a 15-minute break) depending on the number of participants. At least one hour is needed for the group presentations and summarising discussions that are essential to this exercise.

Materials and equipment: handouts “Case study: the Triffids” handout “Action plan”, handout “Academic research vs. Policy advice”, five sets of coloured markers, flipchart sheets, adhesive tape (alternative).

Purpose: The purpose of this exercise is to put the participants into a “real” situation and help them to identify similarities and differences between the academic and applied policy research approaches.

Method: Case study. The participants receive the Triffid case and have to prepare advisory plans and academic research plans on the basis of the information provided to them during the previous lectures. After the discussion of the case materials each group will have to present their plans to the rest of the participants. Once the presentations are completed the trainer should summarise the discussions and distribute the “Academic research vs. policy advice” handout.

Notes for the trainers: The handout below can be distributed to the participants together with the case materials. Training course participants have pointed out that they would prefer actual cases from their countries, however experience shows that it’s better to have the more generic case such as the Triffids rather than the case specific to one country when the participants represent various regions.

If the participants point out that the case is irrelevant to reality, the trainers should present examples from practice that are similar to the problem of Triffids. The problem of stray dogs in Bucharest, where packs of stray dogs terrorise the city yet government efforts to deal with the problem are undermined by the various organisations fighting for animal rights and opposing the government’s policies is one such example.

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Handout "Action plan"

Task: after reviewing and discussing in the group the case materials distributed to you, prepare an action plan for the group of advisors using the structure below.

Academic Policy

Major Objective

Client

Method of Analysis

Subject of Analysis

Data Gathering

Alternatives

Time Constraints

Budget Constraints

Product

General Weaknesses

Handout “Case study: The Triffids”

Adapted from case study prepared by Paul Grant & Christopher Jary for the Hungarian Institute of Public Administration

Background

1. It is the year 2003. Back in 1995 a survey party in the Amazon basin discovered a new form of plant life - the Triffid. This plant is some two metres high and unique in its mobility – by the means of three stilt-like legs it can move at some 30 metres per hour. Retractable roots draw some nourishment from the soil but its main source of food is animal. It hides in a suitable place and uses its long whip-like “tongue” to sting passing small animals. The end of its tongue injects paralyzing venom and the Triffid moves to stand over its prey, which it then ingests.

2. It was soon discovered that these curious plants thrive in a temperate climate and, as they take little nourishment from the soil, grow well in the least fertile areas. The oil that flows in their thick central stem makes a cheap and well-flavoured substitute for olive oil in cooking. Various medicinal claims – mostly unsustainable – have also been made for this oil and current research suggests that it may act to halt the development of arthritis. More speculatively, some pressure groups assert that an extract derived from the oil may be effective in the treatment of AIDS.

Triffid farming

3. The commercial attractions of Triffid oil have meant that what started as a small industry has very quickly developed to the point where by 2001 Gallardia was exporting 100 million litres of Triffid oil annually (41% of overall production), contributing some US\$150m to the balance of payments. Olive oil imports have fallen sharply. Most of the industry is located in the western part of Gallardia. There are some small local distributors but 80% of the wholesale trade is handled by two subsidiaries of multinational chemical industries – Triffoil, Inc. and Gallardia Oil.

4. The suppliers of this oil range from those keeping a couple of Triffids in a corner of a field to farmers running herds of several hundred Triffids. In 2001 there were around 3,000 Triffid keepers in Gallardia and the estimate is that some 11,000 people are employed as Triffid attendants.

5. About 75% of the Triffid keepers in Gallardia, including almost all the large-scale farmers, belong to the National Association for Farming Triffids (NAFT). This Association was established in 1998 to exchange information on good practice in Triffid farming and to encourage high professional standards in the maintenance of Triffids. A trade union (the Triffid Workers Organisation/TWO) was also established in 1998. Its membership covers some 80% of eligible workers.

Safety

6. The main problem of Triffid farming is Triffid stings. The venom which paralyzes the Triffid’s prey is also injurious to humans: the sting of a young Triffid causes only a mild blister but that of a mature adult produces serious local burns, high fever and temporary paralysis. Triffid venom in the eyes has led to permanently damaged eyesight and, in a human of poor general health, it seems likely that a Triffid sting could prove fatal.

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7. Triffids on farms are “ detoxified “ by cutting away the venom sacs below the tongue. This is done in the first three months after germination, but the sacs grow again and the operation must be repeated annually. Detoxified Triffids cannot hunt for themselves and are fed a meat diet to supplement the intake of their root system. Triffids due for detoxification can produce a nasty sting and workers wear protective clothing. The Triffid Workers’ Organisation is concerned that the available protective clothing is not adequate and that there is no scale of compensation for injuries from the Triffid venom agreed upon.

Triffid welfare

8. There is still a lot to learn about the biology of Triffids, but it’s clear that scientifically they are plants and not animals. However, to the layman, plants that move and even give the appearance of communicating via the stalks that vibrate against their main stem are not so readily classified (the true function of the vibrating stalks has not yet been identified). It has been argued, principally by animal welfare pressure groups, that, at least until their biology is better understood, the welfare of Triffids should be approached by analogy with wild animals rather than with plants. In particular, Triffids clearly suffer a systemic shock after their weekly oil draining from which they’ve only just recovered before the next. It is argued that such treatment of animals for a profitable but non-essential product would not be tolerated. The National Association for Farming Triffids reject this argument as emotive nonsense and say that Triffid welfare requires (and receives) the same approach as that of wheat or potatoes.

9. Pressure groups, especially those opposed to scientific experiments on animals, are also concerned about Triffids in government-run and private laboratories. Research into the medical properties of Triffid oil causes little concern. But research into Triffid venom requires its regular removal from the Triffids kept for the purpose. The Triffids suffer obvious – if temporary – systemic damage when this is done. (It may be possible to derive a new anaesthetic from the venom and its study is providing insights into the operation of motor nerves.) Other researchers are observing the reproductive and other processes of Triffids including their reaction to, for example, extremes of temperature or light deprivation.

Recent developments

10. The Triffid industry is steadily growing and its significance in the Gallardian economy increasing. However, since early 1998 there have been a small but rising number of reports of ‘rogue’ Triffids. These plants have escaped from their enclosures, possibly as very small plants (Triffids can move when only 15 centimetres high), or possibly as adults through breaches in the fencing. They survive by nourishment taken in through the roots until their venom sacs grow again. At that stage they are very dangerous and there have been a number of reported injuries to humans (two of which have resulted in blindness). Cats and small dogs have been stung and ingested by these Triffids. Rather embarrassingly for the Gallardian Government, some Triffids from farms in the extreme west of Gallardia have recently escaped the country. This has led to the Ambassador from neighbouring Coppellia to press for compensation on behalf of Coppellian citizens stung by Gallardian Triffids.

11. So far, however, all rogue Triffids reported have been individuals and have been tracked down and recaptured. But it seems inevitable that, if further precautions are not taken, colonies of wild Triffids will establish themselves outside human control. There has been much concern in the media over this issue and politicians from all political parties have called for Government action to protect the public by regulating Triffid farming.

12. Other Triffid farming countries are also facing this problem. The USA has already sharply reduced the quantity of Triffid oil it produces after stringent licensing arrangements for Triffid farmers were introduced.

Handout “Academic Research vs. Policy Advice”

	Academic	Policy
Major Objective	Construction of theories for understanding society Goal = Understanding	Prediction of impacts of changes in “variables” that can be altered by the government Goal = Change
Client	An unspecified client: “the public interest”, “truth” as defined by the disciplines	A particular client, a specific or collective decision maker (participants in the policy arena) Need for constant communication
Common Style	Rigorous methodology to construct and test theories; often retrospective Mode = explanation	Application of formal methodology to policy-relevant questions; prediction of consequences Mode = evaluation
Method of Analysis	Using scientific methodologies to describe phenomena and/or determine relationships among them	Synthesis of existing research and information to draw from it policy alternatives and preferences stated in comparable, predicted quantitative and qualitative terms as a basis for policy decisions
Subject of Analysis	A subject-oriented, as opposed to a problem-oriented scope (e.g. the transportation system vs. Congestion of the downtown loop)	An issue or problem orientation
Data Gathering	Extensive inventory phase, usually for gathering data on various aspects of the studied subject (demographics, economic characteristics, infrastructure, environment, etc.)	Inventory or search phase, limited in scope and directed at a particular issue, data are often taken from research analysis
Alternatives	A search for alternative solutions, which may be exhaustive, but significant alternatives are eliminated before presentation to the client (public)	A constrained search for alternatives, which are then usually evaluated and presented to the client
Time Constraints	A rather long-term horizon, rarely external time constraints	A time horizon often compromised by terms of elected officials and uncertainty Deadline pressure
Budget Constraints	Rarely external budget constraints	Utilisation of available resources (own and offered by the client)
Product	Plan, study	Concept, position paper, or draft legislation to be delivered to the client in the proper format
General Weaknesses	Often irrelevant to information needs of decision makers	Difficulty in translating findings into government action

3.3 Lecture “Differences between academic work and advising”

Estimated duration: 10-15 minutes

Materials and equipment: Handout “Policy analysis in perspective”, overhead projector or multimedia projector

Method: Work in groups (2 or 4 depending on the number of trainees), brainstorming, lecture, and class discussion.

Notes for the trainers: The purpose of this lecture is to raise the awareness of the trainees of the different nature of advisory and academic work.

This topic can be approached in two ways. Normally, the lecture should follow the Triffid case study (see p. 58) and summarise the reports of the teams. If the teams had carried out good analysis and presented exhaustive comments, the trainer should only restate the main points rather than going into an in-depth discussion of the differences between theoretical and applied research.

However if the participants have failed in carrying out the assignment or have missed some important points, the lecturer should provide the more comprehensive version of the lecture identifying all differences and similarities, as well as discussing their implications on the role and capacities of the advisor.

In both cases the lecturer should establish clear links between the group discussion, the presentations and the points he/ she is emphasising. It is up to the lecturer to identify the important issues that were brought up during group discussions but were not reflected in group presentations and subsequent analysis.

Key points:

Defining and testing theoretical models alone does not constitute sufficient assistance for public administration professionals. The advisor should carry out research that provides sufficient information for making practical recommendations.

The recommendations provided in academic reports should be as practical as possible. As well, they should be well argued, and placed in the political, social and economic context. Meanwhile the recommendations generated by academic research can form an ideal model, detached from practice.

In order to prepare policy advice that meets required standards, the advisor should also choose an adequate scope of work, information gathering methods and analytical techniques, plan the process in terms of timing and budgeting as well as such technical issues as the size of the document.

Despite these key differences, purely academic studies and their reports also have a role in government advising. Conclusions of the background reports, broader or longer-term trend studies, etc., although not immediately applicable, may help decision-makers to see the issues they are dealing with at a managerial level in a wider context.

References: Manual “How to be a better policy advisor” pages 37-43, 92

Handout “Policy Analysis in Perspective”

Paradigms	Major Objective	“Client”	Common Style	Time Constraints	General Weaknesses
Academic social science research	Construction of theories for understanding society	“Truth” as defined by the disciplines; other scholars	Rigorous methodology to construct and test theories; often retrospective	Rarely external time constraints	Often irrelevant to information needs of decision makers
Policy research	Prediction of impacts of changes in “variables” that can be altered by government	Participants in the policy arena; the related disciplines	Applications of formal methodology to policy-relevant questions; prediction of consequences	Sometimes deadline pressure, perhaps mitigated by issue recurrence	Difficulty in translating findings into government action
Classical planning	Defining and achieving desirable future state of society	The “public interest” as professionally defined	Established rules and professional norms; specification of goals objectives	Little immediate time pressure because deals with long-term future	“Wishful thinking” in plans when political process is ignored
The “old” public administration	Efficient execution of programmes established by political processes	The mandated programme	Managerial and legal	Routine decision making; budget cycles	Exclusion of alternatives external to programme
Journalism	Focusing public attention on societal problems	General public	Descriptive	Must move while issue is topical	Lack of analytical depth
Policy analysis	Analysing and presenting alternatives available to politicians in solving public problems	A specific decision maker or collective decision maker	Synthesis of existing research and theory to estimate consequences of alternative decisions	Completion of analysis usually tied to specific decision point	Myopia produced by client orientation and time pressure

Source: David L. Weimer and Aidan R. Vining, *Policy Analysis: concepts and practice*, 1992

3.4 Lecture “What a policy paper is?”

Estimated duration: 15 minutes

Materials and equipment: Handouts “Key components of a policy paper”, “Types of policy papers”, overhead projector or multimedia projector

Method: Lecture, open discussion, questions & answers

Notes for the trainers: The purpose of this lecture is to introduce the participants to the various types of written products, all the while emphasising the difference between academic reports and policy papers.

This lecture should be relatively short and provide the overview of the various types of policy papers as well as the components and qualities of a good policy paper. The latter should be the focal point of the lecture. The case “bad policy paper” is designed to provide the participants with an opportunity to analyse how these qualities are reflected in practice and how to avoid making the same mistakes.

Key points:

The main types of written policy advice documents are:

- Reports from advising projects
- Policy papers
- Draft legislation or comments on legal drafts
- Background study
- Implementation methodology/action plan

Each type of document is written with a specific purpose in mind and, as a result, they vary in terms of form and content. The advisor must clarify what are the real needs of the client and then choose the appropriate format for the written advice.

References: Manual “How to be a better policy advisor”, pages 68-71

Handout “Key Components of a Policy Paper”

- 1) Definition the issue
- 2) Establishment of the facts / scope of the problem
 - i) Background history
 - ii) Current situation, including inadequacies in current policy
- 3) Options / considerations
 - i) Options, if agreement on recommendations is sought
(at least the unacceptable status quo and an alternative)
 - ii) Considerations, if areas of contention need to be profiled
- 4) Recommendation(s)
 - i) At least one
 - ii) Can be several, particularly if strategic response indicated
- 5) Next Steps and Implications
 - i) Issues in implementation
 - ii) Financial / institutional / human resources impacts

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Handout "Types of policy papers"

Purpose of Communication	Type of Policy Paper
Alert decision makers to immediate issue and possible response	Briefing Note
Provide client with analysis of need and opportunity, options and indicated policy response	Policy Paper
Assist client to alert public to emergent need/ opportunity, and solicit suggestions on possible responses	Green Policy Paper
Assist client to inform public of proposed policy to meet a need and seek feedback	White Policy Paper
Assist client to inform public of decided policy to meet a need / seize an opportunity	Policy Statement

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3.5 Case study “Bad policy paper”

Duration: 60 minutes

Materials and equipment: Handout “Bad policy paper”

Purpose: The purpose of this exercise is to provide the participants with an opportunity to review an actual policy paper and apply the knowledge received during the lectures to the analysis of shortcomings and positive aspects of the sample policy advice document.

Method: Example of a bad policy paper is distributed and in 20 minutes the groups have to analyse and identify the mistakes and ways to correct them and report back to the group. Once the groups finish their presentations, the trainer initiates an overall discussion and encourages the participants to share their ideas and suggestions how to improve the sample policy paper.

Notes for the trainers:

Positive	Negative
Clear design	Too general
Summary included	Implications are missing
Clear language	No impact assessment
No jargon	No financial calculations
Concise	No time schedule
Clear headings	Presented alternatives are not real alternatives
	Assessment of the alternatives is too vague
	Only negative assessments are presented
	No page numbers
	Inconsistencies in the text
	Some things are repeated several times
	The layout is faulty (fonts, paragraphs, headings)
	No clear problem definition (the one presented is based on feelings rather than evidence)
	No SMART objectives
	No visual information (graphs, etc.)
	Statements are unclear
	No factual data under financial impact

Summary statement should be clearer, better formulated and touch upon all the important facts and options mentioned in the main text.

All statements should be well argued, based on the evidence, which can be included under the heading “Background” or “Current situation”. However, the evidence should not overburden the reader. Only the most important data illustrating the statements should be included in the main text. If more information is needed it can be presented in the attachments.

The recommendations presented should be neutral, based on clear evidence. The main criteria on which the decision is based should be listed as well.

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Handout "Case study: Bad policy paper"

Prepared by M. Paul Brown

Government of Euroasia

Memorandum to Policy and Priorities Board

Subject: An Internet Policy for Euroasia

Submitted by: Minister of Communications

Prepared by: Person X, Person Y

Deputy Minister: Person Z

Date: June 8, 2001

Summary

The World Wide Web (WWW) is a strategic tool for delivering government information and services to citizens of Euroasia and for educating the world about Euroasia. In order for the government to make the best use of its World Wide Website, the site must be professional, technologically advanced, easy to navigate, and accessible to a wide range of users. A quality site will help Euroasia to:

- Attract new visitors and investor interest
- Deliver information that users need
- Interest users in visiting other areas within the government site
- Keep internet visitors coming back for new ideas and current information

To realise these objectives, Internet use across the government needs to be co-ordinated by implementing standards for design and content, educating government users on those standards, monitoring adherence to the standards, and mentoring towards compliance.

Background

Although the Internet has been in existence for a number of years, the access, ease of use and popularity of Internet has increased dramatically since 1996, due to the growth of the World Wide Web, which allows the user to convey an unfiltered message to the audience. This message can be updated instantaneously, with no increase in costs regardless of where the audience is located. However, the potential of the WWW depends on maintaining an informative, attractive, and up-to date website. One that's badly designed or executed will reflect poorly on the technological competence of the government, and hence the people of Eurasia.

Current situation

The Government of Atlantic Home Page provides a gateway to the Euroasia Website and easy navigation from site to another within the government. It is a 'one-stop shop' where users can find answers to their questions and up-to-date information about initiatives which the government is developing. Because there has been no recognised authority within the government for the design and content of the websites, various departments have developed sites that differ greatly in content, style, and appearance. The diversity of presentation does not enhance the image of the Government of Euroasia, and leads to confusion for the users, who as a result are less likely to return to the Government of Euroasia site.

Objectives

The objectives of this proposed Internet policy are to:

- Ensure that access to services and information via Government of Euroasia websites is provided in a clear, consistent, and understandable manner.
- Ensure that consistent visual identity, application of graphic elements, and navigation standards exist throughout all Government of Euroasia websites.
- Maintain an attractive and highly functional Internet presence for the Government of Euroasia.
- Ensure that the editorial content on all Government of Euroasia websites is understandable, sensitive to cultural issues, and consistent with the corporate goals of the government.
- Enhance the integrity and promote the popularity of the Government of Euroasia websites.

Key Issues

The absence of standards for, and monitoring of, government websites gives rise to several issues:

- Copyrighted materials may be used inappropriately on Government of Euroasia websites.
- Expressions or terms could be used with due regard for the sensitivities of cultural minorities.
- Messages have not been written in everyday language that would ensure most audiences can understand them.
- Though the existing Ministry of Science and Technology (DST) server can handle all the government requirements, at least one department has purchased its own equipment, and others are considering doing the same thing.

Assessment of Alternatives

The alternative to a clear policy and co-ordinated Government of Euroasia Internet presence is the status quo – individual departmental, agency and commission sites, which vary significantly in standards, content, and accessibility. The consequences could be:

- Poor website composition and inappropriate use of graphics
- Potential legal issues arising from inappropriate use of copyrighted materials on Government of Euroasia websites
- Increased costs through the unnecessary acquisition of software and hardware by individual departments/agencies
- Confusion because department/agency pages present material in an inconsistent manner and do not present a clear Government of Euroasia image
- Decreased use of some sites because the information they present is out-of-date, inaccurate, contradictory and/or poorly presented

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Proposed Action and Timing

The Ministry of Communications should be given the recognised accountability to maintain a professional standard for design and content on Government of Euroasia websites. It would thereby have the same degree of accountability for the WWW that it currently has for government publications in hardcopy.

The new policy will ensure that the interests of the Government of Euroasia are served, in that all WWW information will be prepared and presented according to established standards for design and clarity of language.

Accountability

The Ministry of Communications will be responsible for:

- Developing and publishing design guidelines for Government of Euroasia WWW sites
- Developing editorial standards, including clear language and editorial style
- Researching trends in WWW site design to ensure that design guidelines and content standards remain current
- Communicating standards to all internal Internet users

Monitoring

The Ministry of Communications will:

- Monitor and evaluate the overall design and content of Government of Euroasia WWW sites to ensure compliance with this policy
- Advise departments, agencies, and commissions of non-compliance with guidelines and, where necessary (and in consultation with departmental officials), make adjustments to bring the sites into compliance

Appendix A:

The draft guidelines may be viewed on the WWW at the Ministry of Communications intranet site. A printed copy is appended for quick reference.

Financial impact

Corporate use of existing Internet hardware and software at Science and Technology and Communications will reduce spending in this area by other departments.

The Ministry of Communications will meet its responsibility within existing resource allocations.

Communications and Consultation

This proposed policy directive and the draft guidelines have been circulated within government. Suggestions have been incorporated in the draft guidelines. The policy and the guidelines have been approved by the WWW Working Group, which is an *ad hoc* committee of representatives from every department that has an interest in Internet issues.

Since the issue is a matter on internal government management, no external communication is contemplated.

Internally, the Ministry of Communications will:

- Advise all client departments, the WWW Working Group, and departmental communications officers that the policy has been adopted
- Begin educating users as to design and content standards

Interested clients and users have had an input and, in most cases approved, these proposals.

Recommendations

1. That the following policy statement be approved:

It is the policy of the Government of Euroasia that the interests of Euroasia with respect to its WWW presence are best served by maintaining professional design and content standards on WWW sites, and that the Ministry of Communications is accountable for maintaining these standards.

2. That the Ministry of Communications be designated with the authority, and corresponding accountability, for maintaining professional design and clear, appropriate content on the Government of Euroasia World Wide Websites.

3. That the draft Internet guidelines attached be approved.

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3.6 Lecture “Information gathering: methods and techniques”

Estimated duration: 30 minutes

Materials and equipment: Handouts “Comparing data gathering techniques”, “Tips for conducting interviews”, “Interview summary page”, overhead projector or multimedia projector and a computer.

Method: Lecture, discussion.

Notes for the trainers: The purpose of this lecture is to inform the participants of the various information gathering techniques as well as their relative usefulness when working for public sector clients.

This lecture should be a short (no more than 15 minutes) review of the various methods, featuring as well discussions of their qualities and suitability for the applied policy research. The trainer should emphasise the reliance on qualitative methods as opposed to quantitative methods preferred in academic research as well as the need to trust arbitrary judgement in choosing among the alternatives. Depending on the needs of the audience, discussion of analytic techniques can be included as well.

Key points:

The objective of the advisory process is to provide advice to the government officials how to resolve complicated issues considering the time and budgetary constraints and the sensitivities around the issue, etc. On top of that, in most cases the officials want the advice to be provided as soon as possible – best would be immediately.

Therefore the advisor should not be wary of greater reliance on the qualitative data. Clearly, information-gathering methods should be adjusted to the type of advice and the issue, however in most cases quantitative data would serve as an indicator of a problem and supporting argument, but not necessarily the basis for the formulation of good advice. In the meantime, qualitative data will allow drawing upon the “insider insights” that could help to understand the internal processes and the suitability of the various options to the specific situation inside and outside of the organisation better than any statistical analysis.

References: Manual “How to be a better policy advisor” pages 65, 91-122

Handout "Comparison of Data-Collection Techniques"

Characteristic or advantage	Structured interview		Questionnaire		Audit of records
	By telephone	Face-to-face	By mail	Group	
Methodology					
Allows use of probes	3	5	1	2	na
Controls bias of collector	3	2	5	4	5
Can overcome unexpected events in data collections	4	5	2	3	4
Facilitates feedback about instrument or collection procedures	4	5	2	5	2
Allows oral and visual inquiry	1	5	2	5	na
Allows oral and visual response	1	5	2	2	2
Evaluator can control collection procedures	3	5	1	4	5
Facilitates interchange with source	4	5	2	5	na
What contents allow					
Inclusion of most relevant variables	3	5	4	4	3
Complex subject matter to be presented or derived	3	5	3	4	4
Collection of real-time data	5	5	4	5	3
Acquisition of historical data	4	4	4	4	5
Universe of sample					
Relevant universe to be sampled can be identified	4	5	4	5	4
Facilitates contacting and getting sample	3	2	4	4	5
Allows use with large sample	4	3	5	4	5
Allows identity of source to be known	4	5	3	5	3
Reduces problems from respondent's illiteracy	4	5	1	3	na
What time, cost, and resources minimisation					
Instrument-development time	2	3	1	1	5
Instrument-development cost	3	1	1	1	5
Number of field staff	5	?	5	?	?
Travel by staff	5	?	5	?	?
Staff training	2	1	5	3	5
Time required to carry out activities	?	?	3	?	?
Overall cost	3	1	5	4	1
Results, response, and quality of data					
Maximise rate of return of data after source is contacted	4	5	3	5	na
Minimise multiple contacts of sources	2	2	3	4	na
Minimise follow-up after initial response	5	5	3	4	5
Increase chance source will be accurate	4	4	4	4	3
Allow reliability to be checked	5	5	3	4	4
Allow validity to be checked	4	4	2	4	5
Facilitate recall of data by source	4	5	3	4	na

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Key:

- 1 Little or no extent
- 2 Some extent
- 3 Moderate extent
- 4 Great extent
- 5 Very great extent
- ? Depends greatly upon study specification
- N/A Not applicable

(Source: GAO/PEMD-10.1.5 Structured Interviewing)

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Handout "Tips for conducting interviews"

Use the most appropriate communication skills

- If people want to think about their answers, please give them the option of doing so for a moment before beginning the conversation.
- Here are some possible questions to use to probe further:
 - Tell me more.
 - How did that affect you?
 - What was your contribution?
 - What do you think was making it work really?
 - How has it changed you?
 - Do you think that this thing can be realised if ... ?
 - If I understand, you want to say that ... ?
- Let the interviewee tell their story, free from focusing on a similar story of yours or your opinion about the interviewee's experiences.
- Try to observe also the non-verbal communication, body language, facial expressions, the use of hands or the range of emotions that they can show you during the discussions.
- Take good notes and listen for great quotes and stories.
- Ask permission to use other ways of recording the information (voice recorder, video camera, etc.)
- If somebody doesn't want to or can't answer any of the interview questions, that's OK. Let it be.

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Handout "Interview summary page"

What was the most quotable quote that came out of this interview?

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What was the most compelling story that came out of this interview? (Use the back of this page if necessary.)

What were the themes that stood out for you during the interview?

- 1.
- 2.
- 3.

Essential features of visions for the future:

- 1.
- 2.
- 3.

4. Topic "The Client"

4. Topic "The Client"

The first thing that the advisor must be aware of is that the people who hire the advisor are not necessarily the recipients of the advisor's work. Often, the question "who is the real client?" is the first puzzle that the advisor has to solve. Is it the ultimate beneficiary or is it sponsor who pays for advisor's services? Or is it the person who is ordering the advisor's services and formulating problems and questions? The answers to these questions can only be found if the roles, positions, and interests of different players involved in the exercise are clarified.

The advisor should explore the environment they'll be working in to understand relationships among different agents involved in the process. This exploration will help to identify which person (-s) or organisation:

- Pays the advisor
- Defines the goals
- Evaluates the work
- Adopts results and implements the action plan forthcoming from the advice

The lectures and exercises under this topic are designed to raise awareness of the differences among clients, their needs and potential problems for the advisor. The lectures and exercises are grouped into two main blocks:

- Lecture "Environment of the client"
- Group work "Problems in advising locally, nationally and internationally"
- Brainstorming "Types of clients"
- Lecture "Different clients: needs assessment"
- Role-play "Needs assessment"

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4.1 Lecture "Environment of the client"

Estimated duration: 20 minutes

Materials and equipment: Handouts "Conceptual elements of the market system vs. public policy-making system", "Skills needed in new policy-making environment", overhead projector or multimedia projector and computer.

Method: Lecture, questions & answers

Notes for the trainers: The purpose of this lecture is to introduce the participants to the main considerations they have to keep in mind while working for public institutions.

Experience with four pilot training programmes shows that this topic is most useful when drawing parallels among the different countries and regions represented in the audience. That's because the dimensions of the environment in which public officials function, as well as the challenges they are facing, almost in all cases are very much alike even if other factors separate countries.

Clearly there are differences as regards the timing, social context and political priorities. However, all participants in all four pilot training sessions were able to recognise the same trends and issues. In connection with the discussion on the skills of the advisor this topic allows to build the awareness of the specifics of public policy advice and further develop understanding of their own professional development needs.

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Key points:

Governance in a changing environment

- Changes in economic system (From command economy towards market economy)
- Changes in political and administrative systems (From authoritarian system towards democratic policy making)

A few potential problems in dealing with public clients

- The request for advice is quite vague; the client frequently is not aware what they exactly need?
- In most cases the advisor will have to satisfy the expectations of more than one client, or it is not exactly clear who the client is initially?
- The advisor meets (and deals with) real people that could produce many problems coming from:
 - Hostility towards advisors;
 - Hidden power structure in the department, sector, etc.;
 - Subordinate structure strength, producing various obstacles in reaching different levels and in receiving information.
- There may be strong cleavages and opposing ideas about the issue you have to advice on within the client's organisation itself, among public organisations, or among various stakeholders' groups, in general.
- Political changes (unexpected and even expected) may produce many difficulties or even jettisoning (or running down) the advisory project.
- Some changes that come from the client could also create problems in advisory work, such as:
 - Changes in the client's interests;
 - Situation changes and displaces the client as such
 - The client often begins to expect advice on additional problems that the advisor was not initially expected to provide.
- Cuts of the expenditure on the advisory project and no new sources available, etc.
- Client jeopardises the advisory work considering it to be unpaid everyday brainstorming on different topics.
- Difficulties in acquiring of information or unpredictable information gap that could not be filled (even if the advisor thought they could receive it in a confidential manner).
- Don't forget the **corruption phenomena** existing in different regions.

References: Manual "How to be a better policy advisor" pages 17-23, 47-54

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Handout "Conceptual elements of the market system vs. public policy-making system"

Market system

Exchange process
 Private goods and services
 Economic value system
 Self interest
 The invisible hand
 Economic roles
 (producers-consumers-investors-employees)
 Consumer sovereignty
 Profit as reward
 Business as the major institution

Operating principles:

efficiency, productivity, growth

Policy making system

Political process
 Public goods and services
 Diverse value system
 Public interest
 The visible hand
 Political roles
 (politicians-citizens-public interest groups)
 Citizen sovereignty
 Power as reward
 Government as the major institution

Operating principles:

justice, equity, fairness

Source: Rogene Bucholz, 1985 *Essentials of Public Policy for Management*, New Jersey: Prentice-Hall, Inc.

Handout “Skills needed in new policy-making environment”

(Areas of expertise: education, healthcare, defence and others)

- Ability to understand current political situation;
- Ability to put any problem to its broader social context;
- Understanding of organisational structure in policy-making system;
- Skills in using techniques of economic and statistical analysis;
- Ability to understand value system of the society;
- Ability to identify public interest;
- Ability to be honest, objective and independent;
- Ability to control own emotions;
- Good communication skills required.

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4.2 Exercise “Problems in advising”

Duration: 50 minutes

Materials and equipment: Handout “Problems in advising”, flipchart sheets and colour markers.

Purpose: The purpose of this exercise is to build awareness among the participants of the obstacles and complications they may face in their work as advisors. Besides that the exercise will provide them with some ideas as regards the solutions or preventive measures they can use in their practice.

Method: Structured discussion. Participants share their experiences in working with the governments and answer the questions distributed to them. The groups are assembled on the basis of the experiences presented during introductory exercise as well as during the “placing experiences in the cycle” exercise. Each group focuses either on problems at local, national or international levels and after the discussions they present summaries of their conclusions to the others.

Before distributing the handout, the trainers should mark what level of government the participants should be thinking about (check an appropriate box below the title).

The trainer then facilitates the discussion on the differences and similarities among the three groups as well as potential solutions for the problems identified.

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Handout "Problems in advising"

International National Local

Task: Based on your own experiences and previous discussions, please provide answers to the questions below. After discussing your ideas in your group, please prepare a presentation for the rest of the participants and select one representative who will present your findings.

Please, while preparing your presentation and delivering it, pay attention to your style of verbal and non-verbal communication:

1. Name the problems you've had in establishing communications with the clients and share them with your colleagues in the small group.

2. Outline the problems at local, national or international levels depending on the assignment for your group.

3. How did you solve these problems? How to prevent them from appearing?

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4.3 Exercise "Types of clients"

Duration: 15 minutes

Materials and equipment: Flipchart sheets, markers, adhesive tape (alternative).

Purpose: The purpose of this exercise is to raise awareness of the participants of the potential clients and their diversity as well as the reasons why they may be seeking policy advice. This exercise will also help prepare the advisors for dealing with these clients as well as establishing the necessary framework for further discussions on needs analysis and the role-play.

Method: Brainstorming - Who can be a client??? The participants identify all the different clients and group them by the specific nature into logical groups. The trainer leads discussion toward an understanding of the differences between the client that pays and the client that receives the advice, and the conflict between the two.

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4.4 Lecture “Diverse clients = diverse needs”

Estimated duration: 15 minutes

Materials and equipment: Handouts “Public clients”, “The stakeholders”, overhead projector or multi-media projector and a computer

Method: Lecture, questions & answers

Notes for the trainers: The purpose of this lecture is to raise the awareness of the trainees that public sector clients are diverse and each institution has its own needs. Therefore the lecture should focus on the analysis of the types of clients and the role of needs analysis in advising.

The listing of the various types of clients can either be presented by the trainer within the framework of this lecture or compiled during a brainstorming session beforehand. The choice of the method is up to the trainer and should be based on the assessment of the needs of the participants as well as the framework of the programme.

Since the lecture precedes the role play (based on the Triffid case, introduced under the topic “academic vs. policy research”), it should provide the general overview of the issue and the main indications as to how to carry out needs analysis. A short discussion on the methods that help to identify the real needs of the client and input from the participants based on their experiences should close the lecture.

Key points:

Provision of new perspectives is crucial for changes in public policy. Public administration sector employees have to cope with a number of problems that were unknown a few years ago. Policy-makers are often not prepared properly to perform their functions. Sometimes decisions are made using trial-and-error methods. Problem-solving abilities of management cadre are limited because they often get too close to an issue. They only see it in terms of their existing expectations. The advisor can add value by helping them step back from a problem, to see it from a different perspective and to see new ways to find solutions.

- The advisor should ultimately aim to help the client to see not only problems but also opportunities to do things differently and perhaps better.
- Provision of support for arguments that will be used for justifying policy options is seen as the basic task of the advisor.
- The client represented by a specific person may be tempted to use an advisor, not to provide an impartial view, but in order to back up their own position in a debate.
- The advisor is not employed by an abstract “governmental agency”, but rather by individuals working for this agency.
- A good advisory project should be based on solid understanding of the needs of the client and the client institution.

Needs assessments also help to: a) better understand the institution the advisor will be working with in this task; b) understand the role of advisor envisaged by the client. Needs assessment is a good opportunity to tell the client that there is some trade-off and that they substantively influence the project.

It is important not to rush with needs’ assessment. It should be done according to the plan and the advisor must be sure after the needs’ assessment that they know precisely what is expected of them.

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Various methods and techniques may be used in order to assess the needs of the client. Interviews and questionnaires are the most popular tools for this task. Here the advisor should remember all the tips discussed in the 3.6 “Information gathering techniques” lecture and focus on reading both verbal and non-verbal cues. In addition, it’s always worthwhile complementing the information received through one channel with some insights generated elsewhere.

References: Manual “How to be a better policy advisor” pages 60-62

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Handout "Public Clients"

Forms of expressing their demand

Public Administration Institutions	<p>Most of the work for advisors in public administration is found within these institutions. It is these institutions that are responsible for developing policy, identifying options, assessing costs and benefits, preparing draft legislation, and evaluating outcome after implementation. Most of the assistance that international donors provide for public administration reform is focused on these institutions.</p>
Parliament	<p>Advisory projects for parliament usually concern the work of special or standing commissions and specialised working groups that the Parliament forms in order to deal with complex legislation. The legislation in question may originate in parliament, in which case the advisory project is likely to include some research, hearings and negotiations with social groups, and possibly drafting legislation. Or the legislation may have come from the government, in which case the advisory work is normally more limited to provision of expertise on technical questions. Within the institution, those responsible for the project may be line managers (e.g., heads of departments) or it may be a special working group or taskforce.</p>
Political Parties	<p>Political parties are not significant consumers of advisory projects. For the most part, when they do use outside advice, it is done on a small scale, and involves direct advice, normally not based on a great deal of research. Also, parties tend to consume outside policy advice mostly before elections. Outside donors rarely (if ever) knowingly fund party activities. In recent decades, parties do hire more advisors, but often communications and image specialists, not so much policy advisors.</p> <p>Expect proposals from political parties when the elections are drawing closer.</p>

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Handout "The Stakeholders: their interests and relations to the advisory project"

Please remember your experience in advising the governments and, drawing on this example, think how you would fill in this table.

The stakeholders	Interests of stakeholders (verbal description)	Impact of the advisory project on the interests of the stakeholders	Importance of the stakeholders' roles on the final success of the project	Degree of the stakeholders' impact on the project
<i>Each group will have to be clearly identified as a group</i>		Positive (+) Negative (-) Neutral (o)	Small (S) Medium (M) Strong (S) Critical Agent (CA)	Low (L) Moderate (M) Significant (S) Crucial (C)
1. Client	<i>Comprehensive description of interests in favour of the advisory project or against it</i>	<i>The impact will have to be estimated from the point of view of the conflicts of interests</i>	<i>The task is to know the importance of the stakeholders on the final results of the advisory work</i>	<i>Worthy of mention here is that some stakeholder(s) could benefit from the advisory project but not to be in a position to influence it</i>
2. The organisation that pays for the project	..	+	CA	C
3. Organisation that defines the goals				
4. Organisation that evaluates the results				
5. Organisation that accepts results and implements the action plan drawn from the advice				
6. Organisations that are not directly involved in the advisory project but could benefit from it (or could be against it)				
7. The Advisor				
8. Etc.				

4.5 Role play “Needs assessment”

Duration: 105 minutes

Materials and equipment: Handouts “Role-play: The Triffids II”, individual group handouts, flipchart sheets, markers, adhesive paper.

Purpose: The purpose of this exercise is to provide the participants with an opportunity to apply the new knowledge on the differences between the clients as well as the tools of needs’ analysis in practice.

Method: The participants receive further materials of the Triffid case and on the basis of the structure presented during the lecture assess the needs of the different stakeholders. The participants are divided into five groups that represent the three ministries (Agriculture, Finance, and Health), Environmentalists (Green Gallardia and Animal Protection League), and Triffid industry (National Association for Farming Triffids). Each group should assume the role of the team of advisors working for the specific organisation. Working groups have 45 minutes to prepare their positions.

Each group receives its own set of information and based on it sets about working out as clear an assessment of the situation for their client as possible. In order to do that, the teams should consult not only the materials describing the situation, but also assess the needs of their client and other stakeholders and prepare advice that would help their client to negotiate own interests in the government meeting.

The trainer should also remind the participants that they would have to present their conclusions at the “government meeting”, representing their clients.

Notes for the trainers: for smaller groups only the three ministries may be selected instead of the five quite diverse players. It is essential to keep the number of the working group members small enough to allow adequate levels of participation. The Ministry of Defence may be added for larger audiences. However, the trainers should remember that regardless of the size of the working groups, each group will need time to present their opinions and arguments, therefore the time allotted for group presentations needs to be extended by 10 minutes for each additional group.

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Role play “The Triffids II”

Adapted from case study prepared by Paul Grant & Christopher Jary for the Hungarian Institute of Administration

A number of ministries and interest groups have an interest in Triffids and they will have an opportunity to express their views at the upcoming inter-ministerial meeting. Each Ministry is asked to submit a preliminary analysis and views to the Government Committee and prepare a 15-minute presentation. Each syndicate group should consider the given information and questions and be prepared to report back.

The Government has therefore asked each Ministry to form a Committee of Inquiry into Triffids, which has not yet reported back. Its terms of reference are:

- “To examine the conditions under which Triffids are kept in Gallardia with particular regard to the need to ensure the safety of Triffid workers and the general public;
- To consider the conditions which should be attached to the granting of a licence to a company or individual to keep Triffids;
- To recommend the government regimen most appropriate to oversee the granting of licences to keep Triffids;
- To make any further recommendations which the Committee deems appropriate to establish proper oversight of the Gallardian Triffid industry.”

The following ministries will be represented:

- Health
- Finance
- Agriculture
- Defence (optional)

Do consider the interests of other ministries such as Economy, Education and Science, and other interest groups such as Trade Unions, Employers’ Union, Oil Company, National Farmers’ Union, Animal Protection League, public etc.

Handout “Ministry of Health”

Triffid stings represent a public health issue for which you are responsible. Whilst the number of the people stung by Triffids is relatively small – and there is no firm evidence that anyone has ever been killed – you cannot ignore public opinion entirely, which strongly supports tough new regulations.

Your Ministry is also responsible for the pharmaceutical industry. The potential medical benefits of the by-products are exciting, and an antidote to Triffid venom would be a major advance.

Those involved in research would probably require licences should a licensing system be introduced and this might reduce the number of research projects.

You are the Ministry of Health advisors who prepare the briefing note. Your minister has asked for a meeting with you to review your thinking so far. You had hoped to have a meeting with representatives from other ministries before the meeting with the minister, but this has not been possible.

The possible issues to be raised by the minister:

- Is there a real problem with Triffids?
- What is the objective for the Gallardian Government as a whole on the issue of Triffid safety?
- What are the interests of the Ministry of Health?
- Who might other stakeholders be and what about their interests and needs?
- What should the Ministry of Health’s policy aims and objectives for Triffids be?
- What options are there to put your agreed policy objective into practice?
- What are the arguments the minister can use at the meeting?
- What specific recommendation will you make to ministers?

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Handout “Ministry of Finance”

You feel that a voluntary code of practice would be an adequate safeguard and much cheaper. Any substantial rise in the price of Triffid oil will be reflected in the retail price index and may increase inflation. All ministries should be involved in Triffid production and research, including standards of safety, security and Triffid welfare.

You are concerned that a licensing scheme might impose a heavy bureaucratic burden, especially on small firms. Another consequence might be the multinational companies moving their Triffid activities to neighbouring countries where farming remains unrestricted. A voluntary code of practice would be preferable. It would be wrong to impose penalties on a thriving industry in a panic reaction.

You are the Ministry of Finance advisors who prepare the briefing note. Your minister has asked for a meeting with you to review your thinking so far. You had hoped to have a meeting with representatives from other Ministries before meeting the minister but this has not been possible.

The possible issues to be raised by the minister:

- Is there a real problem with Triffids?
- What is the objective for the Gallardian Government as a whole on the issue of Triffid safety?
- What are the interests of the Ministry of Finance?
- What other stakeholders might exist and what their interests and needs might be?
- What should the Ministry of Finance’s policy aims and objectives for Triffids be?
- What options are there to put your agreed policy objective into practice?
- What are the arguments the minister can use at the meeting?
- What specific recommendation will you make to ministers?

Handout “Ministry of Agriculture”

Many Government Ministries have an interest in Triffids, but Agriculture is the lead Ministry. It is concerned with promoting a safe and efficient Triffid oil industry. Recent pressure has been such that the Minister for Agriculture has publicly conceded that some form of licensing might need to be introduced for Triffid keepers. But the minister is in a difficult position on this issue, since any unilateral action taken by the Gallardian Government might put Gallardian industry at a competitive disadvantage.

Submission from the Parliamentary Committee on Agriculture

Politicians from all parties believe that, while it is important not to impose unreasonable burdens on Triffid farmers, the overriding concern of the Government must be the safety of Triffid workers and the general public.

You are the Agriculture Ministry’s advisors preparing the briefing note. Your minister has asked for a meeting with you to review your thinking so far. You had hoped to have a meeting with representatives from other Ministries before the meeting with the minister but this has not been possible.

The possible issues to be raised by the minister:

- Is there a real problem with Triffids?
- What is the objective for the Gallardian Government as a whole on the issue of Triffid safety?
- What are the interests of the Ministry of Agriculture?
- What other stakeholders might exist and what might their interests and needs be?
- What should the Agriculture Ministry’s policy aims and objectives be with respect to Triffids?
- What are the arguments the minister can use at the meeting?
- What the options are to put your agreed policy objectives into practice?

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Handout “Joint Committee of the National Association for Farming Triffids and National Farmers’ Union”

It’s important not to panic because of the occasional accident – this is just an occupational hazard of farming. (No-one suggests you should have a licence to keep a bull.) National Association for Farming Triffids is issuing advice to members on Triffid security. It could do more but it is hampered by a lack of funds. National Association for Farming Triffids suggests that the Government makes membership of the Association compulsory and funds the association to undertake further promotional and research work. Triffids are plants not animals. All good farmers are concerned about the well-being of their crops, but it’s ridiculous to suggest that Triffids experience maltreatment.

It’s in the interests of the farmers and the producers of Triffid products to keep things as they are and avoid excessive regulation. Many farmers believe that stringent rules and the nonsensical suggestions of the tree-huggers and the always over-protective Labour and Health ministries are useless, potentially damaging the already overburdened lives of rural citizens. The regulations imposed on the farmers will make it impossible to take advantage of this opportunity and to equalise rural and urban development. These farmers, who have already suffered from the effects of globalisation, see the Triffid industry as their only opportunity to achieve adequate standards of living.

You are the advisors contracted by the Chairman of the Joint Committee and asked to prepare the briefing note. Your client has asked for a meeting with you to review your thinking so far. You had hoped to have a meeting with representatives from the relevant Ministries beforehand, but this has not been possible.

The possible questions to be raised by the Chairman of the Committee:

- Is there a real problem with the Triffids?
- What are the objectives of the Gallardian Government on the issue of Triffid safety?
- What are the interests of the producers and the farmers?
- What other stakeholders might exist and what might their interests and needs be?
- What should the aims and objectives of the Joint Committee be?
- What are the arguments the Chairman of the Committee can use at the Government meeting?
- What options are there to put your agreed policy objective into practice?

Handout “Green Gallardia and The Animal Protection League”

Green Gallardia is the most powerful NGO in the country. Its members have achieved significant changes in government policies by peaceful means such as lobbying and peaceful demonstrations. The Animal Protection League is a different matter. In the past it has carried out several attacks on pharmaceuticals and cosmetics factories that were testing their products on animals. Some participants of these attacks ended up in correctional facilities for their actions. In recent years however the Animal Protection League has tried to reform itself and has adopted more conventional ways to pressure governments. In this case the AP has decided to join forces with Green Gallardia, the leaders of which felt that the issue of the Triffids is serious enough to ally with the formerly-radical organisation.

Both organisations have issued a joint statement:

“Until and unless proved otherwise, Triffids must be given the benefit of the doubt as living beings that have feelings. Treating the Triffids as plants would mean breaking the fundamental values that lie at heart of Gallardian democratic society ... any licensing scheme must provide against the ill treatment of Triffids whether in the interest of scientific research or for commercial profit.”

You are the advisors who have been asked prepare the briefing note for the head of Green Gallardia, who is preparing for the Government meeting to which representatives of several main stakeholders have been invited. Your client has asked to meet with you to review your thinking so far. You had hoped to have a meeting with representatives from other ministries beforehand but this has not been possible.

The possible issues to be raised by the Client:

- Is there a real problem with the Triffids?
- What is the objective for the Gallardian Government as a whole on the issue of Triffid safety?
- What are the interests of Green Gallardia and Animal Protection League?
- What other stakeholders might exist and what might their interests and needs be?
- What should the Green Gallardia and Animal Protection League objectives and suggested policies for Triffids be?
- What are the arguments your client can use at the meeting?
- What are the options to put your suggested policy objective into practice?

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Handout “Ministry of Defence “

(Optional)

There is clearly potential to manufacture weapons using Triffid venom and research is being carried out in this area. In view of the potential of venom as a weapon, a licensing system for Triffid farming should definitely be implemented. This should allow government defence research agencies to continue their work on Triffid research while also allowing controlled farming by private companies to continue solely for the purposes of oil production.

You are the Ministry of Defence advisors who prepare the briefing note. Your minister has asked for a meeting with you to review your thinking so far. You had hoped to have a meeting with representatives from other ministries before the meeting with the minister but this has not been possible.

The possible issues to be raised by the minister:

- Is there a real problem with Triffids?
- What is the objective for the Gallardian Government as a whole on the issue of Triffid safety?
- What are the interests of the Ministry of Defence?
- What other stakeholders might exist and what might their interests and needs be?
- What should the Ministry of Defence’s policy aims and objectives for Triffids be?
- What are the options to put your agreed policy objective into practice?
- What are the arguments the minister can use at the meeting?
- What specific recommendation will you make to ministers?

5. Topic “The Advisor”

Good advisor should:

- Possess subject-matter knowledge of the issue,
- Possess good analytical skills,
- Possess good project management skills,
- Possess good relationship-building skills,
- Possess good communication skills,
- Be tolerant of ambiguity,
- Be patient and calm,
- Have good attitude to clients and
- Be creative in approaching tasks.

But this isn't all. If the advisor comes from academia, then first of all they should have the courage to leave the world of pure science and traditional academic research and be able to apply their knowledge of methods and techniques of research for practical advice purposes. Besides that they should have a clear understanding of different aspects of advice, as well as an understanding of the government environment and policy-making process. Finally, objective evaluation of their potential as an advisor. This entails an understanding and recognition of the ethics of advisory activities. As well, respect for the knowledge of other people is of utmost importance if the advisor is to succeed in making the transition from academia to the “real world” of public officials and politicians.

Although this topic is the key focus of the overall training programme, relatively little lecturing will take place in relation to it. The learning process should rather be built on the basis of practical group work; exchange of experiences during facilitated discussions and the reflection and analysis of own experiences, attitudes and skills. Therefore, only two lectures are included here, however even those lectures can be delivered as facilitated exchange of information rather than just trainer input.

This manual includes the following materials designed to raise the awareness of the participants on what skills they will need in working with public officials and what they should change about themselves:

- Brainstorming “Skills needed in advising government”
- Lecture (discussion) “Skills of a good advisor”
- Facilitated discussion “Advisor an agent of change or a servant?”
- Lecture (discussion) “Marketing yourself”
- Exercise “Revision of own CV”
- Communication skills and other tests
- Exercise “Planning own professional development”
- Role-play “Tendering exercise”

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5.1 Exercise “Skills of a good advisor”

Duration: 10 minutes

Materials and equipment: Colourful stickers, markers, flipchart sheets and adhesive paper.

Purpose: The purpose of this exercise is to allow the participants, while reflecting on their own experiences, to identify the most important skills of the advisor and to discuss how they are important to their work.

Method: Idea generation. Each participant gets three stickers and writes down one important skill per sticker, places it on the flipchart and explains the meaning and why this skill is attributed to that section.

Alternatively, the participants receive the questionnaire and after answering the questions (5 minutes) write only one, most important skill under the appropriate section of the drawing (structure below).

Notes for the trainers: The participants of the pilot training sessions have commented that sometimes they felt that there are too many “sticker” exercises, i.e. assignments where they have to write ideas on the stickers. Since this method is very useful when various ideas have to be discussed and assigned places in defined structures (e.g. policy cycles, under various headings, the planning stages etc.), it should not be eliminated, however different techniques should be adopted in order to reduce this “colourful sticker effect”. Therefore, it would be better to alternate “the sticker” and “the handout” methods.

Handout "Skills of a good advisor?"

The profile of the good advisor

- Choose the three most important skills of a good advisor (according to your experience) and write them down on stickers
- Explain the meaning
- Listen to the explanations of your colleagues and pick up the most important skills for the good advisor.

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5.2 Lecture “Skills of a good advisor”

Estimated duration: 15-30 minutes

Materials and equipment: Handouts “Skills of a good advisor”, “Listening skills”, “Questioning skills”, “Teamwork skills”, “Some rules for dealing with resistance”, “Assertiveness”, colourful stickers, markers, flipchart sheets

Method: Lecturing or facilitated discussion. The lecture follows a brainstorming session.

Notes for the trainers: The purpose of this lecture is to raise awareness of the participants of the skills they will need in working as advisors in the public sector.

This lecture is optional and depends on how the brainstorming session and further discussion go. In those cases when the audience has some practical experience in advising, chances are that the trainees will list all necessary skills and will have sufficient examples explaining the need for one or another set of skills. In this case, the role of the trainer will simply be to summarise the results of the discussion. However in those cases when the trainees are beginners, more extensive input from the trainer will be needed.

As well as that, the materials presented here can also serve for several lectures depending on what the trainer emphasises. For instance, separate lectures accompanied by assignments and short exercises can be delivered on verbal vs. non-verbal communication, assertiveness and overcoming the resistance, teamwork skills, and presentation skills.

Key points:

Types of communication skills

The main communication skills to be discussed here are:

- Observation
- Listening
- Questioning

Observation skills

There are three steps in using the skills involved in observation:

- Step 1: Look at the person’s face, body position, and body movements.

Is the person smiling? Frowning? Nodding? Yawning? Looking at you? Looking away?

Is the person leaning forward? Leaning back in the chair? Tapping a pencil? Shuffling their feet?

- Step 2: Formulate an inference of the person’s feelings based on what you have observed.
- Step 3: Take appropriate action based on the inferences made.

Figure 1 below provides a list of non-verbal behaviours and some inferences you might make about the feelings of clients when you observe them.

References: Manual “How to be a better policy advisor” pages 79-84

Handout "Clients' non-verbal behaviour and their feelings"

Behaviours	Possible Feelings
Smiling Nodding affirmatively Leaning forward Eye contact	Enthusiasm/Understanding
Yawning Vacant stare Shuffling feet Leaning back in chair Looking at clock	Boredom
Frowning Scratching head Pursing lips Vacant stare Avoiding eye contact	Confusion

Although a single behaviour can serve as an indicator of a feeling, your inferences will be based on the total data you collect from the continuing observations you make during the conversation. Whether you decide to take action or not will depend on the situation as you view it.

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Handout “Listening skills”

Listening, as we define it, means obtaining verbal information and verifying that you understand the information. Listening skills enable you to demonstrate your understanding of the participant’s perspective. They also provide you with feedback. You can use this feedback in considering how you need to proceed in conducting your conversation with the client.

Listening involves two key steps:

- Listen to the words being expressed, which means maintaining concentration on what the client is saying.
- Paraphrasing what was said to demonstrate understanding, which means interacting with the client to ensure accurate understanding of the client’s information.

Step 1: Listen to the words being expressed.

As you listen to the words being expressed, try to grasp both the content and the meaning of the words from the perspective of a participant. While this may sound simple, you’ll find that the major roadblocks to listening to the participant’s words are the internal and external distractions that compete with good ‘listening’ habits.

Internal distractions are the competing thoughts that develop inside you while participants are talking. Sometimes they are related to what the participant is saying; sometimes they are mental excursions to unrelated topics. You must eliminate these internal distractions that keep you from focusing on what the participant is saying.

External distractions are things that happen in the environment. They can be sights or sounds. Exclude them, or at least defer giving attention to them until the participant has finished speaking.

Once you have focused on the participant’s message, you can then proceed to the next step – demonstrating your understanding of what the ‘learner’ said.

Step 2: Paraphrase what was said to demonstrate understanding.

Paraphrasing to demonstrate understanding requires you to verbally interact with the participant. The interaction is either to:

- Get additional information to fill in your understanding gaps, or to
- Verify with the participant what you think was said.

Use a phrase such as “You’re saying...” or “As I understand it...” before paraphrasing what the person said. If you then paraphrase the information accurately, the participant can confirm that you have demonstrated understanding. Or, if you paraphrase inaccurately or miss important details, information can be added to help you understand.

Handout “Questioning skills”

Questions play a major role in conducting conversation. One of the most important skills here is asking and phrasing questions.

Asking Questions

Asking questions effectively is one of the most important skills you can develop. This means selecting the right type of question, phrasing it so it elicits the response you are after; then directing the question appropriately.

Types of Questions

There are two basic types of questions from which to choose – open and closed questions.

Figure below gives a brief description and an example of each type.

Type of Question	Description	Example
Open	Requires more than a “yes” or “no” answer. Stimulates thinking. Elicits discussion. Usually begins with “what,” “how,” “when,” “why.”	“What ideas do you have for explaining the changes to our clients?” “How did all these things happen?”
Closed	Requires a one-word answer. Closes off discussion. Usually begins with “is,” “can,” “how many,” “does.”	“Does everyone understand the changes we’ve discussed?”

Phrasing Questions

Once you have decided on the type of question you will use, you need to determine how you will phrase it. There are important considerations in phrasing questions so that the interlocutors are focused on the precise information you are trying to obtain. Figure 3 provides some guidelines for you to use in phrasing your questions.

Do	Don’t
Ask clear, concise questions covering a single issue.	Ask rambling, ambiguous questions covering multiple issues.
Ask reasonable questions based on what the participants can be expected to know at this point in the training.	Ask questions that are not related to the topic.
Ask honest, relevant questions.	Ask “trick” questions designed to fool the interlocutor.

Handout "Skills of a good advisor"

Analytical skills:

- Identifying the needs and problems
- What information is needed in a particular situation?
- What information about the problem is available?
- Analysing the way in which decision-making occurs within the organisation
- Processing the information
- Drawing meanings from information and be able to apply it to the problems at hand

Skills in using information:

- Processing the information
- Drawing meanings from information and be able to apply it to the problems at hand
- Using information to make a case for a particular course of action

Communication skills:

- Observation
- Active listening
- Questioning
- Giving feedback
- Presenting findings and selecting appropriate forms of presentation
- Negotiating objectives, outputs and outcomes
- Conflict resolution
- Convincing through verbal, written and visual mediums

Ability to use humour when necessary

Skills to develop selling strategies

Team-working skills

Handout "Team-work skills"

Behaviours in the Team That...

Help	Hinder
Be on time/ be prepared	Be critical, negative
Participate, volunteer	Personal attacks
Engage in open, honest communication	Dominate
Listen to understand; speak to be understood	Engage in name calling/stereotyping
Stick to the agenda	Be manipulative
Build on others' ideas	Jump from one topic to another
Be optimistic/positive about team	Mask statements as questions
Criticise ideas, not members	Selectively interpret
Provide leadership (when needed) without threatening formal facilitator	Agree with everything
Performed promised follow-up	Avoid decision making or closure through sarcasm
Pay attention, stay open-minded	Seek sympathy
Take problems seriously	Express futility, resignation or helplessness
Be courteous, honest, trusting	Withdraw psychologically
Say what you feel/think	Reflect boredom/don't pay attention
Take risks	Be prejudiced
Use "we" expressions and thoughts	Be close-minded
Support each other	Use "you" statements
Show commitment toward making it work	Don't communicate, co-operate or participate
Display a sense of humour	Judge ideas/others
Set realistic goals/timeframe on goals	Don't listen (engage in other conversations)
Establish clearly-defined roles	Do other distracting work
Distribute labour equally	

Adapted from: The Team Building, Tool kit, Deborah Harrington-Mackin, Amacom, New York, 1994.

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5.3 Exercise “Skills of a good advisor”

Duration: 15 minutes

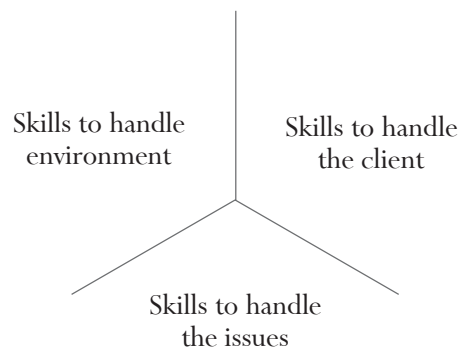
Equipment: Previously prepared idea map (exercise 5.1) and a pre-made poster with a drawn structure presented below:

Objective: The purpose of this exercise is to allow the participants, after reflecting on their own experiences, to identify the most important skills of the advisor and to discuss how they are important in their work.

Method: Participants take the stickers with the recorded skills of the advisor and place them on the poster in the area where the skill fits. When distributing skills among “the environment”, “the client” and “the issue” the trainees are to explain why the skill they are working with falls in the category they are assigning it to.

Notes for the trainers: Watch the time! This exercise may be time-consuming. Therefore, you don’t need to analyse all the recorded skills. It is enough to distribute a few just to establish a common understanding in the group. However each participant who wants to take part in this exercise should have a chance to do so. But as a trainer you should observe the rest of the audience and stop the exercise when the participants start to lose interest.

Structuring the Skills of the good advisor



5.4 Exercise “Self-assessment”

Duration: 20 minutes

Equipment: Handouts “Self-assessment”, “Presentation skills”, “Self-development plan”

Objective: The objective of these exercises is to allow the participants to test themselves and to assess their skills that they’ve discussed during the training sessions.

Method: Most of the tests and questionnaires should be done as homework. Experience shows that testing sessions during the day are perceived as a waste of time. However it is important to allow the participants to look at themselves and to try and plan their own professional development on the basis of the trainer input and the discussions, as well as testing results. This self-development plan will represent a tangible result of the training seminar and will establish some continuity to the training.

Once the trainees complete their self-development plans, one or two of them should present examples to the rest of the audience, preferably each presenting a different type of action plan, i.e. one short-term, another one medium-term and the last one a long-term development action.

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Handout "Self-assessment"

The participants, based on the self-assessment questionnaires develop their individual professional (as an advisor) development plan.

Qualities of a good advisor

On a scale from 1 (very little) to 5 (very much) tell us (put an X on the appropriate place) how do you score on the following qualities?

Quality	1	2	3	4	5
1. I am perceptive	_____	_____	_____	_____	_____
2. I can use my intuition well	_____	_____	_____	_____	_____
3. I can use my imagination well	_____	_____	_____	_____	_____
4. I am flexible	_____	_____	_____	_____	_____
5. I have a lot of courage	_____	_____	_____	_____	_____
6. I have integrity	_____	_____	_____	_____	_____
7. I am open and honest	_____	_____	_____	_____	_____
8. I am patient	_____	_____	_____	_____	_____
9. I am communicative	_____	_____	_____	_____	_____
10. I am a good negotiator	_____	_____	_____	_____	_____
11. I am good at identifying needs and problems	_____	_____	_____	_____	_____
12. I can easily identify what information is needed in a particular situation?	_____	_____	_____	_____	_____
13. I can easily identify what information about the problem is available?	_____	_____	_____	_____	_____
14. I am good at analysing the way in which decision-making occurs within the organisation	_____	_____	_____	_____	_____
15. I am good at processing the information	_____	_____	_____	_____	_____
16. I am good at drawing meanings from information and able to apply it to the problems at hand	_____	_____	_____	_____	_____
17. I am good at drawing meanings from information and	_____	_____	_____	_____	_____
18. I am good at applying the information to the problems at hand	_____	_____	_____	_____	_____
19. I am good at using information to make a case for a particular course of action	_____	_____	_____	_____	_____
20. I am a good observer	_____	_____	_____	_____	_____
21. I am good at active listening	_____	_____	_____	_____	_____
22. I am good at questioning	_____	_____	_____	_____	_____
23. I am good at giving a feedback	_____	_____	_____	_____	_____
24. I am good at generating feedback	_____	_____	_____	_____	_____
25. I am good at presenting findings and selecting appropriate forms of presentation	_____	_____	_____	_____	_____
26. I am good at negotiating objectives, outputs and outcomes	_____	_____	_____	_____	_____
27. I am good at conflict resolution	_____	_____	_____	_____	_____
28. I can be convincing through verbal, written and visual mediums	_____	_____	_____	_____	_____
29. I am good at using humour when necessary	_____	_____	_____	_____	_____

Handout "Presentation skills"

To be a more effective presenter, it is useful to examine your presentation skills. The following self-evaluation can help determine the areas on which to focus to increase your competency. Please read the statement and then circle the number that best describes you. Then concentrate on those items you marked 1, 2 or 3.

	Always	Never					
1. I determine the basic objectives before planning a presentation.	5	4	3	2	1		
2. I analyse the values, learning styles, needs and constraints of my audience.	5	4	3	2	1		
3. I write down the main ideas first, in order to build a presentation around them.	5	4	3	2	1		
4. I incorporate both a preview and review of the main ideas as my presentation is organised.	5	4	3	2	1		
5. I develop an introduction that will catch the attention of my audience and still provide the necessary background information.	5	4	3	2	1		
6. My conclusion refers back to the introduction and, if appropriate, contains a call-to-action statement.	5	4	3	2	1		
7. The visual aids I use are carefully prepared, simple, easy to read, and have impact.	5	4	3	2	1		
8. The number of visual aids will enhance, not detract, from my presentation.	5	4	3	2	1		
9. If my presentation is persuasive, arguments are used that are logical and that support my assertions.	5	4	3	2	1		
10. I use my nervousness and anxiety to fuel the enthusiasm of my presentation, not hold me back.	5	4	3	2	1		
11. I ensure the benefits suggested to my audience are clear and compelling.	5	4	3	2	1		
12. I communicate ideas with enthusiasm.	5	4	3	2	1		
13. I rehearse (practice, practice, practice) so there is a minimum focus on notes and maximum attention paid to my audience.	5	4	3	2	1		
14. My notes contain only "key words" so I avoid reading from a manuscript or technical paper.	5	4	3	2	1		
15. My presentations are rehearsed standing up and using visual aids.	5	4	3	2	1		
16. I prepare answers to anticipated questions, and practice responding to them.	5	4	3	2	1		
17. I arrange seating (if appropriate) and check audio-visual equipment in advance of the presentation.	5	4	3	2	1		
18. I maintain good eye contact with the audience at all times.	5	4	3	2	1		
19. My gestures are natural and not constrained by anxiety.	5	4	3	2	1		
20. My voice is strong and clear and is not a monotone.	5	4	3	2	1		

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Handout "Self-development plan"

By the end of this year I will ...

(identify the skills and knowledge important to the advisory work you are building up over the long-term)

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When?

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How?

During next three years I will ...

(identify the skills and knowledge important to the advisory work you are building up over the long-term)

When?

What?

How?

During the next 5 years + I will ...

(identify the skills and knowledge important to the advisory work you are building up over the long-term)

When?

What?

How?

5.5 Lecture “Marketing yourself: things to remember”

Estimated duration: 30 minutes

Materials and equipment: Handouts “Sample CV formats”, “Developing a CV”, overhead projector or multimedia projector and a computer.

Method: Lecturing or facilitated discussion prior to the “Updating your CV” practical session.

Notes for the trainers: The purpose of this lecture is to introduce and discuss the various ways of self-marketing in the modern advisory market.

Analysis shows that even good professionals in the region lack the necessary assertive attitudes and skills for self-marketing. Therefore, the main task for the trainer here is to demonstrate that although in academia it’s often enough to write well and to publish a lot, in advising other methods have to be adopted in order to place oneself on the list of candidates for advisory jobs. As with the skills of the advisor lecture, whether this material will be delivered as a short lecture or as a moderated exchange of ideas depends on the needs and potential of the audience as well as the place allotted for the topic and the overall dynamics of the training. However, in both cases it is important to have a discussion on the applicability of methods and tools in the local settings.

Key points:

Formal ways

- Send CV with cover letter
- Apply for tenders
- Apply for advertisements
- Ask for an interview with potential client

Informal ways

- Networking
- Former students working for the government
- Former or present colleagues having positions or already working as advisors for government
- Participating in various events where you can meet potential clients
- Meet potential clients while doing your own research

Other ways

- Publish the parts of research findings that may be relevant for practitioners in periodicals that are read regularly by such practitioners
- Use your research activity as advice activity.

The best “recommendation” is a previous successful advice project.

References: Manual “How to be a better policy advisor” pages 85-86

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5.6 Exercise “Developing a Curriculum Vitae”

Duration: 20-30 minutes

Equipment: A4 size paper, printed CV of the participants they had submitted to the organisers, or a computer and a floppy disk for each participant and electronic versions of the CVs, Handout “Developing a CV”

Purpose: The purpose of this exercise is to provide the participants with an opportunity to revise their CVs, redesign them on the basis of advice received and update the information presented.

Method: The participants review their own CVs and update them following the guidelines and advice provided by the trainers.

Notes for the trainers: the trainers should review the CVs of all participants and decide on the need for this exercise as well as the time necessary to complete it on the basis of the assessment. It may appear that most participants already have good CVs. In this case, the exercise should be cancelled or alternatively the participants may be given a choice of working 30 minutes longer and update their CVs. Hence this exercise should be organised either before lunch or at the end of the day.

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Handout “Developing a CV”

Remember the texts you have read in your life – the ones you remember best – are the ones that were the easiest to read and were written to the point, i.e. you’ve found in them the information you were expecting to find after reading the title and reviewing the contents. The same with the Curriculum Vitae – a government official or a donor you will pre-select the CVs from a pile on the basis of a few glances through them. So the main objective in front of the advisor when he/she sets out to write own CV is to make it is easy to read, clear and focused on showing the characteristics which make you a good advisor.

A professional CV should be:

- a) Clear
- b) Concise (3 pages max.)
- c) Emphasising **ONLY** the information on your background and experience that is relevant to the client, the prospective assignment or the donor. E.g. long lists of publications are not always relevant to the client. Leave only those relevant to the assignment.
- d) Put the most important information on the first page, as this is the page that will receive the most attention
- e) Make clear headings of separate sections of the CV, e.g. **Education** or **Consulting experience** so as to help the reader to find the relevant information easier.
- f) Make sure that your CV meets the requirements of the client. In some cases, e.g. PHARE/TACIS has a specific framework for CVs, the same can definitely be said.
- g) Hobbies, gender, marital status as well as age and other such information are rarely relevant therefore in most cases it would constitute excessive information distracting the client from your credentials.
- h) **NO MISTAKES!** If you intend to provide a professional advice to government how to solve the problems, show that
- i) **THERE ARE NO LIES!** Your reputation is your main marketing tool. Once you’ve been discovered to distort information to advance yourself, you can kiss your advisory career goodbye. Even if you’ve made a mistake unwittingly, it may leave you with a reputation as a liar.

Best is to have two periodically updated CVs – one academic and another one for the professional market.

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European curriculum vitae format



Personal information

Name [Surname, other name(s)]
Address [House number, street name, postcode, city, country]
Telephone
Fax
E-mail
Nationality
Date of birth [Day, month, year]

Work experience

Dates (from – to) [Add separate entries for each relevant post occupied, starting with the most recent]
Name and address of employer
Type of business or sector
Occupation or position held
Main activities and responsibilities

Education and training

Dates (from – to) [Add separate entries for each relevant course you have completed, starting with the most recent]
Name and type of organisation providing education and training
Principal subjects/occupational skills covered
Title of qualification awarded
Level in national classification (if appropriate)

Page 1 - Curriculum vitae of
[SURNAME, other names]

For more information go to
www.cedefop.eu.int/transparency/europa.eu.int/comm/education/index_en.html
eurescv-search.com

Personal skills and competences

Acquired in the course of life and career but not necessarily covered by formal certificates and diplomas.

Mother tongue	[Specify mother tongue]
Other languages	[Specify language]
Reading skills	[Indicate level: excellent, good, basic]
Writing skills	[Indicate level: excellent, good, basic]
Verbal skills	[Indicate level: excellent, good, basic]

Social skills and competences

Living and working with other people, in multicultural environments, in positions where communication is important and situations where teamwork is essential (for example culture and sports), etc.

[Describe these competencies and indicate where they were acquired]

Organisational skills and competences

Co-ordination and administration of people, projects and budgets; at work, in voluntary work (for example culture and sports) and at home, etc.

[Describe these competencies and indicate where they were acquired]

Technical skills and competences

With computers, specific kinds of equipment, machinery, etc.

[Describe these competencies and indicate where they were acquired]

Artistic skills and competences

Music, writing, design, etc.

[Describe these competencies and indicate where they were acquired]

Other skills and competences

Competencies not mentioned above

[Describe these competencies and indicate where they were acquired]

Driving licence(s)

Additional information

[Include here any other information that may be relevant, for example, contact persons, references, etceteras]

Annexes

[List any attached annexes]

Page 2 - Curriculum vitae of
[SURNAME, other names]

For more information go to
[www.cedefop.eu.int/transparency/
europa.eu.int/comm/education/index_en.html](http://www.cedefop.eu.int/transparency/europa.eu.int/comm/education/index_en.html)
eurescv-search.com

Curriculum vitae

(LGI, Sofia, Bulgaria)

Name:

Address:

Telephone:

Fax:

E-mail:

Nationality:

Education:

Professional Experience:

Membership of Professional Bodies:

Languages:

Speaking

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Writing

Other Skills:

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5.7 Role play “Tendering exercise”

Duration: 120-150 minutes

Equipment: Flipchart sheets, 5 sets of colour markers, adhesive paper

Purpose: The purpose of this exercise is to summarise the information provided to the participants throughout the training course. They will be provided with an opportunity to apply the knowledge and information received while competing for a government tender to prepare and deliver policy advice on the issue of Triffids.

Method: The participants should be divided into three or four groups and assuming the roles of advisory teams prepare and present project proposals to the government meeting competing for a tender. The information below is a public tender announcement that was published in the national newspapers and electronic lists. This is where the teams from different academic institutions received the information. All participants should also remember that they have a chance to ask the client representative questions in order to clarify his/her needs.

Notes for the trainers: Firstly, the teams CANNOT be the same that worked together on the previous assignment. Experience shows that in this case they run the risk of associating themselves with the previous assignment and the bodies they have represented, forgetting that the client is – Government Office.

Another issue is the public procurement regulation that the same information be made available to all competitors. In this case, we want to emphasise the importance of analysing the needs of the client and pro-activeness in that aspect. Therefore, when announcing the tender the trainer should point out that this rule is not being adhered to deliberately.

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Handout "Tender announcement"

The Government of Gallardia is launching

Triffid Strategy

Invitation to tender

Background: (please consult THE PROBLEM with TRIFFIDS)

Objectives:

The objectives of the Strategy are:

- To assess the dimensions of possible problems related to Triffid farming in Gallardia
- To make appropriate recommendations to the Inter-Ministerial Commission for Triffids, including proposals, draft of laws or other regulations as may be needed
- To prepare an implementation plan for the measures proposed
- To elaborate a monitoring and evaluation procedure.

Requirements:

The strategy must fulfil the following key criteria:

- Be aware of related strategies, existing relationships, policies, interests of the ministries, agencies, organisations involved;
- Propose actions necessary to address identified needs
- Consider to what extent existing Triffid habits and customs in the different domains can be harmonised into new standards
- Describe mechanisms that promote cross-domain partnerships

Project management

In each stage of the project the consultant is required to consult with stakeholder.

The tenders will be judged according to the following evaluation criteria:

- Scope
- Appropriateness of methodology
- Costs
- Credibility and track record of the candidates
- Timeframe

6. Energisers

6. Energisers

6.1 Game with the ball

Duration: 5-10 minutes

Equipment: small light ball, preferably not too bouncy or springy

Purpose: This exercise is designed to raise the levels of energy (“to wake up”) among the participants and to give them an opportunity to reflect on the things they have learned during previous activities. This exercise is especially useful at times of the day when the participants become a bit tired, sleepy or distracted from the learning process. Experience shows that some trainees will feel uncomfortable in this situation if it’s their first experience with active training. In that case it’s best to allow for some adjustment time and to try passing the ball onto them again. Usually after seeing others getting involved in such “childish” activities, even the sceptics will be engaged and participate in the activity.

Caution: do not use this exercise after each break. You can use this game not more than 1-2 times throughout the three-day training. This exercise is very good for completing a day session as a final reflection.

Method: The trainer welcomes everyone and explains the “Ball game”. The participants have to say one thing they remember best from the previous day (or another specified period) once they receive a ball. Once everyone has had a chance to speak at least once or twice, the trainer stops the game and quickly reviews the plan for the following part of the training event.

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6.2 Forming a line

Duration: 5 minutes

Equipment: No special equipment is necessary, however there has to be sufficient space in the room for people to move around.

Purpose: This exercise is designed to raise the levels of energy (“to wake up”) among the participants and to lend an opportunity for the trainers to break the participants into groups for further work.

Method: The participants are to form a descending line starting from the tallest to the shortest one with their eyes closed. Alternatively, the participants are asked to stand in one line by their birth date in either ascending or descending order. The trick here is that the task is to be carried out without speaking.

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6.3 Musical chairs

Duration: 5-10 minutes

Equipment: This game requires sufficient space to form a circle of chairs. The trainer needs to make sure there's one chair less than the number of participants.

Purpose: This exercise is designed to raise the level of energy after a lunch or a difficult section or topic. It may serve also as a way of getting to know each other in a less formal way. The trainer should be the first one to stand and ask a few questions (2-3 rounds) in order to explain the rules and to check that everyone understands clearly how to play the game.

Method: Arrange chairs (one less than the number of participants) in a circle. The standing person has to come up with a certain feature that may unite several people – e.g. those with blue eyes or those with brown shoes or those speaking more than three languages or those who play the piano, etc. Those who share this feature have to stand up and quickly find a new place to sit, including the person who asked the question. The person who did not manage to find a place (the number of chairs is always less than the number of participants by one) takes the lead and asks the next question.

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Working notes

Materials and equipment: Handouts “Working notes”

Notes for the trainers: It is always useful to provide the participants with the necessary framework for reflection. Although chances are that the participants will only fill these working notes before the next day’s morning session, still the availability of such a working notepad will force them to reflect and single out several of the most important facts or ideas. Once recorded, these ideas will remain better etched in the memories of the participants.

In order to encourage the participants to take some time to reflect and think about ways to improve themselves it is important to ask 1-2 participants to quote what they have recorded in their working notes. If needed, the trainers may also collect the working notes midway through the training event in order to see how the participants understand the main messages of the training.

The handouts below should be distributed together with the initial information package on the first day of training.

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Handout "Working notes"

Name:

Day 1

I. What were the most important and interesting things I have heard during the first day?

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II. What will be useful for my future advisory work?

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Day 2

III. What were the most important and interesting things I have heard during the second day?

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IV. What will be useful for my future advisory work?

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Day 3

V. What were the most important and interesting things picked up during the third day?

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VI. What will be useful for my future advisory work?

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Day 4

VII. What were the most important and interesting things picked up during the fourth day?

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VIII. What will be useful for my future advisory work?

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Suggested training course programme

Venue: a room with movable chairs and tables or desks, 2 smaller rooms for group work.

Group size: 15-20 participants

Time: 3.5 days

The main objective of the course is to raise awareness of how to transform from a researcher to a policy advisor able to assist the government on development issues and to compete in the advisory market.

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DAY 1

Time	Activity	Method	Notes	Supplies equipment
9:00	Opening			
9:10	Introduction: Trainers Trainees	Trainer speaks Icebreaker: Trainees do interviews	Interview: <ul style="list-style-type: none"> What is your name? Where do you come from? Your professional background? What is your hobby? 	Name tags Multimedia presentation Flipcharts, adhesive paper/ alternative Colourful markers
9:45	Expectations Aims and objectives of the training	Brainstorming Trainer speaks	<ul style="list-style-type: none"> What do I expect from this training? <p>The trainees suggest their ideas (brainstorming), while one trainer moderates and another one records the ideas.</p> <p>The trainers introduce the objectives of the training course</p> <ul style="list-style-type: none"> What are we offering in this training? The trainer establishes the links between the aims of the course and the expectations of the trainees. 	Flipcharts, adhesive paper/ alternative Colourful markers
10:05	Contract	Facilitated discussion	<ul style="list-style-type: none"> What will be the norms of our behaviour in the room? <p>The trainers make some suggestions and ask the trainees to suggest their entries and agree on them.</p>	Flipcharts, colourful markers
10:30	Break			
10:45	Experience of the participants in advising	Defining existing experiences	<ul style="list-style-type: none"> What do we know about advising? <p>The participants each take a sticker and write down their experiences (1-2) and place them on a blank sheet of flipchart paper and explain while doing so the context of this experience.</p>	Colourful stickers Flipcharts, adhesive paper/ alternative Colourful markers
11:00	Policy cycle: The need for advice Stages	Lecture Discussion referring to their experiences	<p>Definition of public policy. Presentation of the policy cycle on the basis of the annex to the manual. This topic has to be given more attention.</p> <p>Besides that, the importance of policy advice as such has to be discussed.</p>	Multimedia (PowerPoint presentation) Flipcharts, adhesive paper/ alternative Colourful markers Handouts
11:25	Types and points of intervention for policy advisors	Discussion. Assigning experiences a place in the cycle	<p>Analysis of advisory experiences. Participants take their description of experience and place it at the appropriate place on the policy cycle and explain why, providing the information on who the recipient was, what the essence of the advice was, and what methods were used to produce it.</p>	Flipcharts Adhesive paper/alternative Colourful markers

12:00	Skills of a good advisor	Idea generation	Each participant gets three stickers and writes down one important skill per sticker, places it on the blank sheet of paper and explains the meaning.	Colourful stickers Flipcharts, adhesive paper/ alternative Colourful markers
12:15	Structuring ideas	Pre-made structure	With the assistance of the trainers, participants try to attribute each skill to one of the three “fields”: handling the issue, handling the client and handling the environment.	Colourful stickers Flipcharts, adhesive paper/ alternative Colourful markers
12:30	Lunch			
14:00	Introduction: aims of the session and the case study	Energiser Trainer speaks	The objectives of this session is to identify and discuss the difference between the advice and the academic research planning and process in terms of major objective, the client, the common style, the method of analysis, subject of analysis, data gathering, alternatives, time constraints, budget constraints, the product. Trainer groups the participants into four groups using active “game-like” energiser, e.g. suggesting the participants to line up by the date of birth without talking or alternative arrangement.	Flipchart, markers
14:10	Case study: advice vs. research	Case study exercise	The case of the Triffid problem in Gallardia. Four groups, two preparing research plans and another two advice plans.	Handouts: case description Flipchart Markers Adhesive paper
15:10	Group presentations: research vs. advice	Presentations and discussion moderated by the trainer	Two groups working in the same room present the results of their work to each other and discuss the differences between the two types of plan.	Flipcharts Adhesive paper/alternative Colourful markers
15:45	Break			
16:00	Group discussion: summarising the results	Group reports and open discussion	Both groups come back together and summarise the results. Conclusions are written down on the flipchart in a clearly understandable and visible format.	Flipcharts Adhesive paper/alternative Colourful markers
16:30	Review of the day, plan for the Day 2, Homework – self-assessment questionnaire	Trainer speaks	Trainer reviews the results of the first day (What? and So what? Exercise), reminds the main objective of the course and outlines the plan for Day 2. Feedback: Δ technique Besides that, the trainer distributes self-assessment questionnaires stressing that this is for individual use and will not be collected or seen by anyone else.	Flipcharts Adhesive paper/alternative Colourful markers

DAY 2

Time	Activity	Method	Notes	Supplies equipment
9:00	Review of day 1 Energiser	Trainer	Feedback on Δ technique	Flipcharts Colourful markers
9:15	Environment: the dimensions, flexibility, and dynamic nature of the environment.	Lecture Questions and answers	Lecture on the specificity of the government environment (time, organisational culture, political cycle, other players, history of the issue, ethics, legal implications, communication, access to info, confidentiality, budget and budgetary cycle, hidden agenda, etc.) Link to skills. Emphasise the idea of public administration as a field. The need for policy advice. The issue of sensitivity to the environment and the need to make the advice acceptable to this environment.	Handouts Flipcharts Adhesive paper/alternative Colourful markers
9:35	Discussion: advisor as an agent of change or just as a servant of the government?	Group work	Emphasis: innovation, honesty, and wisdom, looking beyond the limits. The objective of the discussion is to allow the participants to rethink the role of the advisor, to summarise the outcomes of the discussions and to reinforce the understanding of the policy advice and their own attitudes towards it. The moderator draws toward the conclusion that a good advisor has to be a bit of both, but in suggesting innovations one must be aware of what the government expects, i.e. who the client is and what they want.	Flipcharts Adhesive paper/alternative Colourful markers
10:05	Problems in advising: identification and discussion	Group work	3 groups each discussing one of the three questions: <ul style="list-style-type: none"> • What are the problems of advising at a local level? • What are the problems of advising at a national level? • What are the problems advising internationally? 	Colourful stickers Flipcharts, adhesive paper/alternative Colourful markers
10:30	Break			
10:45	Problems in advising: discussion	Presentation and Discussion	Each group presents the findings and all participants discuss the similarities and differences among the three levels. Trainers ask the participants for their experiences in dealing with these difficulties and outline potential solutions.	Flipcharts Colourful markers
12:00	Preparing and delivering advice (advisory process)	Lecture	The trainer delivers a lecture on the process of advice development and its various stages.	Multimedia Handouts: preparing advice
12:30	Lunch			

14:00	Review of the morning Energiser	Trainer speaks Ball game	The trainer welcomes everyone and explains the “Ball game”. The participants have to say one thing they remember best from the morning session once they receive a ball. Once everyone has had a chance to speak at least once or twice, the trainer stops the game and quickly reviews the plan for the afternoon.	Ball
14:15	Types of clients	Brainstorming	Who can be a client? The participants identify all the different clients and group them by the specific nature into logical groups. Lead the discussion to an understanding of the differences between the client that pays and the client that receives the advice, and the conflict between the two.	Flipcharts Adhesive paper/ alternative Colourful markers
14:30	Different clients: needs assessment.	Lecture	Trainer gives a lecture on needs assessment: why advice is needed, problem specific advice.	Handouts
14:45	Needs assessment: Case study	Case study	Triffid case: 3 ministries (Agriculture, Finance, and Joint Health and Labour & Social Affairs Triffid Task Force), environmentalists, and Triffid industry need to prepare own needs analysis (interests of the particular group, needs, stakeholders) – 5 groups. Each group gets its own set of information. 15 min to read 30 min to analyse and prepare their positions	Handouts: case descriptions Flipcharts Adhesive paper/ alternative Colourful markers
15:30	Break			
15:45	Case study: group presentations and discussions	Discussions	5 + 5 min. group reports and questions & answers 10-min wrap-up and comments	Flipcharts Adhesive paper/ alternative Colourful markers
16:45	Summary of the day activities of the day	Trainer	The trainer summarises the results of the day emphasising the need to understand the environment of the client, the importance of a clear definition of needs, and the features of good advice. The trainees receive a training log form to be filled in during the remaining time or in the evening. Feedback: Δ technique	Handouts: training log form Colourful markers

DAY 3

Time	Activity	Method	Notes	Supplies equipment
9:00	Review of Day 2	Trainer speaks	The trainer asks trainees to share with the others what they have recorded in their training logs. The trainer summarises the discussion by re-emphasising the main points of the previous days and outlines the programme for the day.	
9:15	Information gathering: methods and techniques	Brainstorming + Discussion	Emphasise the need to remember what is the objective of the advice – to provide advice to assess the sensitivities around the issue, etc. Therefore there should be greater reliance on the qualitative data, while quantitative data would be an indicator of a problem and supporting argument, it does not necessarily represent a basis for the formulation of good advice.	Handouts: basic methods Flipcharts Adhesive paper/alternative Colourful markers
9:45	Preparing and delivering advice: types of products	Trainer speaks Open discussion	Trainer evokes a discussion on the experiences of the participants and, referring to the policy cycle, assigns different types of products to different policy cycle stages.	Handouts Flipcharts Adhesive paper/alternative Colourful markers
10:15	What a policy paper is?	Trainer speaks	The trainer explains the properties of a policy paper as an advisory product. Example of types of policy papers. Emphasis on what a policy paper is.	Flipcharts Adhesive paper/alternative Colourful markers
10:30	Break			
10:45	Case study: bad policy paper	Case study Group reports Open discussion	Example of a bad policy paper is distributed and in 30 minutes the groups have to analyse and identify the mistakes and ways to correct them.	Handouts: bad policy paper Flipcharts Adhesive paper/alternative Colourful markers
11:45	Communication skills: listening	Listening skill test	Trainees receive and fill in 'listening' skills test and finalise the tests they were given during previous days.	Handouts: listening skills test
12:30	Lunch			
14:00	Reaching the client: verbal and non-verbal communication	Lecture and exercises	The trainer reviews the main principles relevant to effective verbal and non-verbal communication process and conducts a number of exercises demonstrating the importance of non-verbal communication.	Handouts Flipcharts Adhesive paper/alternative Colourful markers
15:00	Break			

15:15	Reaching the client: Marketing yourself - CV	Discussion	Methods, techniques and experiences. Exercise: developing a CV – the participants review their own CVs and update them following the guidelines and advice provided by the trainers. How to prepare publications list? Sample CVs	Handouts: CVs etc.
16:00	Self-assessment: preparing a plan for own skill development	Individual work Presentations	The participants, based on the self-assessment questionnaires, develop their individual professional (as an advisor) development plan.	Questionnaires
16:45	Summary of the day activities of the day	Trainer	The trainer summarises the results of the day emphasising the need to understand the environment of the client, the importance of a clear definition of needs, and the features of good advice. The trainees receive a training log form to be filled in during the remaining time or in the evening Feedback: Δ technique	Handouts: training log form Colourful markers

DAY 4

Time	Activity	Method	Notes	Supplies equipment
9:00		Simulation	Tender announcement. 3 groups competing for the tender.	Handouts Flipcharts Adhesive paper/alternative Colourful markers
11:30			One of the organisers, ideally an independent person facilitates an oral evaluation session by asking questions and recording the answers of the participants on the flipcharts	Evaluation forms, flipcharts, colourful markers

Course evaluation form

Scale: 1 – dissatisfied/negative, 2 – somewhat dissatisfied/somewhat negative, 3 - indifferent/non-important, 4 – moderately satisfied/moderately positive, 5 – very satisfied/positive

Assess the course according to the following criteria:

Training Course	1	2	3	4	5
(a) Content of the course in terms of depth					
(b) Contents of the course in terms of scope					
(c) Contents of the course in terms of relevance					
(d) Materials in terms of amount					
(e) Materials in terms of quality					
(f) Trainers in terms of their professional knowledge Trainer I* Trainer II Trainer III					
(g) Trainers in terms of their training skills Trainer I Trainer II Trainer III					
(h) Training methods					
(i) Length of course					
(j) Attention given to each topic					
(k) Size of the group of trainees					
(l) Impact of the course on your personal development					

*Indicate the name of the trainer (trainers)

(m) Were your expectations for the course met?

Yes No

If not, then why?

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(n) Do you have ideas or suggestions as to how to improve the training programme for policy advisors?

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(o) What other suggestions or requests for NISPAcee do you have?

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Thank you for your help.

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Suggested further readings:

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