

*Stakeholder Engagement Toolkit for HIV Prevention Trials*

# **Toolkit Orientation and Session Plan for Selected Tasks in Step 4 and Step 7**

August 2014



## **Toolkit Orientation and Session Plan for Selected Tasks in Step 4 and Step 7**

This session plan guides facilitators who are training community liaison officers (CLOs), community educators and others working in community outreach in research settings to engage stakeholders in select tasks as described in Step 4 and Step 7 of the *Stakeholder Engagement Toolkit for HIV Prevention Trials*.<sup>\*</sup> The session plan also includes an overview of the *Toolkit's* resources designed to orient new *Toolkit* users.

By the end of this session, participants will be able to:

1. Describe key features and components of the *Toolkit*, including the E-resources
2. Identify and plan for political, cultural, religious, economic, transportation and other issues/factors that impact research and stakeholder engagement activities
3. Using guidance and tools from the *Toolkit*, interact with stakeholder groups to:
  - Assess knowledge/perceptions using the Agree/Disagree activity
  - Establish group norms and guidelines
  - Build capacity using participant role plays
  - Facilitate agreement through group discussion

<sup>\*</sup> *These tasks were identified during an online survey of CLOs, community educators and others working in community outreach in research settings. Survey respondents felt that practicing these skills using the tools from the Toolkit would improve their confidence conducting these tasks. See page 4 for information about the Toolkit steps and tasks covered in this face-to-face session plan and the e-Resources offered on the CD. For the sake of brevity, the term "community liaison officer (CLO)" will be used throughout these materials.*

### **Facilitator Instructions**

#### **Make training more effective by considering all factors that affect performance**

Follow the guidance in [Learning for Performance](#) to design and implement an intervention—ideally, this is done in collaboration with the participants and their supervisors. Remember that training and learning interventions can only fix knowledge and skills deficits. Conduct a performance needs assessment to identify the cause(s) of the performance gaps, develop interventions to address them and monitor the interventions to measure progress.

This session plan was designed for CLOs, community educators and others working in community outreach in research settings (see \* in box above). The plan addresses a very limited set of objectives that may or may not meet the needs of your learners/participants. Adapt the session plan as needed to address the specific learning needs of your participants as identified by the needs assessment.

#### **Review and adapt training materials**

After compiling the findings from the learning needs assessment, continue your preparation by printing out and studying this session plan, the collateral materials for the activities and the speaker notes for the PowerPoint presentation(s). Decide which activities and presentation content address the learning needs of your participants and adjust the materials accordingly. Anticipate participant questions and prepare answers related to the technical information.

Review the document *Facilitating Role Plays* which includes detailed instructions for conducting the activity, a role play observation checklist, scenarios, character descriptions, guidance for giving and receiving feedback, and instructions for the observer, CLO facilitator and stakeholder roles.

In particular, become very familiar with the *Toolkit* and the E-Resources on the CD/web site, especially the steps and tools featured in this session so that you can reinforce participants' use of these resources during the session. After selecting/adapting the learning objectives, activities, and resource materials, estimate the amount of time that will be required to conduct the activities with your group of participants and create an agenda (rough time estimates for each activity are included in the prototype session plan).

### **Organize the required materials**

#### **PowerPoint presentations: \***

(Contains technical information slides and instructions for conducting participatory activities.)

- Presentation—Primary  
[2-se-toolkit-primary-presentation \(.ppt or .pdf\)](#)
- Presentation—Orientation to the Toolkit Resources (optional resource for in-depth overview)  
[3-se-toolkit-full-orientation \(.ppt or .pdf\)](#)

\* Facilitators without access to PowerPoint, can download PowerPoint viewer to show the presentation:  
<http://www.microsoft.com/en-us/download/details.aspx?id=13>

#### **Participant handouts:**

(For use by participants during and after training to support specific job tasks. Prepare according to instructions noted after each item.)

- Printed copy of the *Toolkit* with CD (one for each participant; if printed copies are not available, provide access to electronic versions of the *Toolkit* and e-Resources)
- Printed agenda and objectives (one for each participant)  
[4-se-agenda-learning-objectives \(.doc or .pdf\)](#)
- Note-taking sheets with slide miniatures (optional; not required)
- Photocopy of study description (Africa or US-based) and question(s) from AVAC's Blueprint, Section 1.4 Sociocultural landscape (one question set per participant in each small group)  
[5-se-sociocultural-small-group-activity \(.doc or .pdf\)](#)
- Role plays (make a full copy of the Facilitating Role Plays document for each participant plus make additional photocopies of the scenario, CLO/facilitator, stakeholder meeting participant and observer information sheets, observation checklist and guidelines for giving and receiving feedback; one set for each small group—cut on dotted lines and place pieces in envelopes to facilitate distribution to the small groups)  
[6-se-facilitating-role-plays \(.doc or .pdf\)](#)

#### **Evaluation:**

(To be completed by participants at the end of the session.)

- Workshop Evaluation Form (make photocopies; one for each participant)  
[7-se-workshop-evaluation-form \(.doc or .pdf\)](#)

**Miscellaneous (available for general use during entire session):**

- Computer (with a CD drive or Internet access and PowerPoint or PowerPoint Viewer installed)
- Multi-media projector and screen or blank wall
- Markers (multiple sets of assorted colors)
- Flip chart paper and stands (one for each small group)
- Small prizes to encourage participant interaction (e.g., candy, snacks and trinkets)
- Blank paper and pens for note-taking

**Other resources related to stakeholder engagement:**

- *Communications Handbook for Clinical Trials: Strategies, Tips, and Tools to Manage Controversy, Convey Your Message, and Disseminate Results*  
<http://www.fhi360.org/resource/communications-handbook-clinical-trials-strategies-tips-and-tools-manage-controversy-convey>
- *Community Conversation Toolkit for HIV Prevention*  
<http://www.fhi360.org/resource/community-conversation-toolkit-hiv-prevention>
- *Partnering for Care in HIV Prevention Trials: A How-To Manual*  
<http://www.fhi360.org/resource/partnering-care-hiv-prevention-trials-how-manual>
- *GPP Blueprint for Stakeholder Engagement*  
<http://www.avac.org/resource/gpp-blueprint-stakeholder-engagement>

## Toolkit Quick Guide Reference Table

This table is from the *Toolkit Quick Guide*; it has been reproduced here for the facilitator's convenience.

 Green highlights indicate the Stakeholder Engagement Steps and Tasks addressed by this session plan.

| Stakeholder Engagement Steps and Tasks  | Toolkit Tools (Word and Excel files)  |
|---|---|
| <b>Step 1. Plan and Budget for Stakeholder Engagement</b>   |   |
| Assess your organization's stakeholder engagement capacity and practices (identify gaps and opportunities for improvement). | <b>1A: Organizational self-assessment</b><br><b>1B: Gaps and opportunities</b>  |
| Create a budget for stakeholder engagement activities.  | <b>1C: Budget for stakeholder engagement</b>  |
| Develop a stakeholder engagement action plan including objectives, activities, staff roles, proposed timeline.              | <b>1D: Action plan</b><br><b>1E: Activity prioritization grid</b><br><b>1F: Matrix of stakeholders</b> (potential roles)<br><b>1G: Work plan</b><br><b>1H: Timeline</b> |
| Develop standard operating procedures (SOPs) for stakeholder engagement staff.  | <b>1I: Sample job descriptions</b>  |
| <b>Step 2. Secure Commitments to Guiding Principles</b>   |   |
| Obtain buy-in for stakeholder engagement activities from other research team members.                                       | <b>2A: Action planning guide</b><br><b>2B: Stakeholder engagement commitment sheet</b>  |
| <b>Step 3. Design a Monitoring and Evaluation System</b>  |   |
| Develop measures to track stakeholder engagement program progress.  | <b>3A: Indicator examples</b>   |
| <b>Step 4. Describe Key Features of the Research Context</b>  |   |
| Identify ways in which political, cultural, economic and climate issues impact research planning, implementation.           | <i>(There are no Toolkit tools for this step.)</i>  |

## Toolkit Quick Guide Reference Table, Part 2

| Stakeholder Engagement Steps and Tasks | Toolkit Tools (Word and Excel files) |
|--|--------------------------------------|
|--|--------------------------------------|

### Step 5. Identify and Describe Stakeholders

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| Identify potential stakeholders and create engagement strategies. | 5A: Stakeholder identification sheet                   |
|   | 5C: Identification of stakeholder roles (Word) (Excel) |
| Develop and maintain a databank of stakeholder data.              | 5B: Stakeholder data collection sheet                  |
|   | 5D: Stakeholder contact record (Word) (Excel)          |

### Step 6. Engage Stakeholders and Sustain Relationships

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| Organize stakeholder advisory groups.   | 6B: Establishing advisory group guidelines   |
| Organize stakeholder engagement events and activities, such as community education sessions and stakeholder meetings. | 6A: Stakeholder contact sheet (Word) (Excel) |
|   | 6C: Organizing an event                      |
|   | 6E: Deciding on a strategy                   |
|   | 6F: Agenda planning                          |
|   | 6G: Brainstorming                            |
|   | 6H: Engaging communities with theatre        |
| Write field reports to document stakeholder engagement activities.  | 6D: Field report                             |

### Step 7. Develop Stakeholder Capacity

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| Assess the knowledge and skills of your community team and stakeholders to determine how to build capabilities.   | 7A: Capacity-building needs assessment                |
|   | 7B: Assessing capacity-building needs for individuals |
| Work with stakeholder groups in various capacities (e.g., establish norms and guidelines, facilitate agreements, develop a shared vision, conduct role plays as a part of capacity-building, create a community action plan). | 7C: Building capacity with participant role play      |
|   | 7D: Action planning for communities, participants     |
|   | 7E: Setting group norms and guidelines                |
|   | 7F: Facilitating agreement                            |
|   | 7G: Developing a shared vision                        |
|   | 7H: Agree/disagree                                    |
|   | 7I: Template for documenting your own tools           |

| Time                         | Instructions for Conducting Learning Activities  | Materials  |
|------------------------------|--|--|
| 20 min                       | <p><b>A. Welcome/Introductions</b></p> <ol style="list-style-type: none"> <li>As participants are entering the room: <ul style="list-style-type: none"> <li>- ask them to write their name BIG on a name tag or tent card at their seat.</li> <li>- obtain a copy of the <i>Stakeholder Engagement Toolkit</i>.</li> <li>- ask them to sit at a table labeled with Africa or US—based on their location</li> </ul> </li> <li>Introduce yourself and announce the name of the course:<br/><i>Stakeholder Engagement—Toolkit Orientation and Practice Session</i></li> <li>Explain your role as the facilitator—describe your background and expertise related to stakeholder engagement. Mention that although you are facilitating—you and the other participants will be relying on the entire group to share their collective stakeholder engagement expertise and experiences with each other.</li> <li>Lead the introductions activity using <b>slide 2</b>—ask participants to gather in a circle and take turns stating their name, title, study site/location and a <i>brief</i> description of the most notable (good/bad) stakeholder engagement activity s/he was ever involved with.</li> <li>Allow enough time for all participants to contribute—but keep the introductions moving briskly. Thank each participant after their introduction—especially those that follow the instructions.</li> </ol> | <p>Name tags or tent cards</p> <p>Markers</p> <p>Slide 2, Primary presentation or prepared flip chart for Introductions</p> <p><i>Stakeholder Engagement Toolkit</i> (one for each participant)</p> <p>Two table placards labeled: Africa and US</p> <p>Room arranged as suggested in the diagram (see speaker notes for slide 1)</p>  |
| 5 min<br><br>25 min<br>total | <p><b>B. Overview of Objectives/Agenda</b></p> <ol style="list-style-type: none"> <li>Review the learning objectives with the participants as outlined on <b>slide 3</b> of the primary presentation. Describe approximately how much time will be spent on each objective and when breaks will be included.</li> <li>In addition to showing the objectives on the slide, post a prepared flipchart of the objectives to refer to throughout the training.</li> <li>Ask participants: Do you have any personal goals or challenges related to these objectives that you would like to address during this session? Make note on the Objectives/Agenda flipchart of related/specific objectives mentioned by participants. If participants mention objectives that will not be included in the session, add these</li> </ol>  | <p>Slide 3, Primary presentation</p> <p>Prepared flip chart for <i>Objectives/Agenda</i> (the objectives and agenda can be combined in a simple list on a single sheet of flipchart paper; include a 5-10 minute break after activity D)</p> <p>Prepared flip chart for <i>Parking Lot</i> (a sheet of flipchart paper for recording items that arise during the session that will either be</p> |

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|                                  | <p>to the Parking Lot and mention that although these will not be addressed in this session, at the close of the session, facilitators and participants may be able to share recommendations or resources for participants interested in that objective/topic.</p> <p><b>Alternative:</b> If the group is large or time is limited, alter this activity to suit the circumstances. Tell participants: Think about how these learning objectives will help you address issues that you confront in your day-to-day activities. As much as possible, bring your experience and challenges into the activities.</p> <ol style="list-style-type: none"> <li>4. Explain that each participant’s mastery of the objectives will be assessed during the session activities by him/herself and their peers by giving and receiving feedback.</li> <li>5. Encourage participants to ask questions during the learning activities and to take notes using the blank paper provided.</li> <li>6. Optional: Tell participants that you are very interested in their feedback. During the activities as they have ideas for improvements, write their ideas on sticky notes and post them on the <i>Suggestions for Improvement</i> flip chart during the breaks. They can also share ideas directly with one of the facilitators if they prefer.</li> <li>7. Optional: Remind participants that table manipulatives have been provided for those who like to keep their hands busy.</li> <li>8. Explain how participants can earn cool prizes by engaging in the activities.</li> <li>9. Ask each table to select a group assistant/volunteer to help facilitate small group activities for their table.</li> </ol> | <p>resolved during a later activity or fall outside the scope of the curricula)</p> <p>Optional: Prepared flip chart for <i>Suggestions for Improvement</i> (a sheet of flipchart paper for participants to post sticky notes containing their ideas for improvements throughout the session)</p> <p>Blank paper</p> <p>Sticky notes</p> <p>Pens</p> <p>Table manipulatives (optional)</p> <p>Printed sheet showing the agenda and objectives for participant packet (<a href="#">4-se-agenda-learning-objectives</a>)</p> <p>Small prizes (e.g., candy or snacks)</p> |
| <p>5 min</p> <p>30 min total</p> | <p><b>C. Establish Group Norms</b></p> <ol style="list-style-type: none"> <li>1. Ask the group to brainstorm: Which norms would you like to establish for today’s session? To expedite this activity, use a prepared flip chart with some common norms for consideration by the group: turn off cell phones, one person talks at a time, everyone is entitled to their opinion, everyone participates fully, share the stage.</li> <li>2. List any additional items suggested by the participants on a flip chart.</li> <li>3. After the list is compiled, ask: Can everyone agree to follow these norms? Ask for a show of hands to confirm agreement.</li> <li>4. Remind participants that if someone is not following the established norms it is the duty of all participants to politely remind one another.</li> </ol>  | <p>Prepared flip chart titled: Group Norms pre-filled with some common norms</p> <p>Markers</p>  |

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| 50 min<br><br>1 hr 20 min<br>Total | <b>D. Orientation to the Stakeholder Engagement Toolkit</b> <ol style="list-style-type: none"> <li>1. Display slide 4 and describe the purpose of the orientation to the Toolkit—relates to session objective #1.</li> <li>2. Use the slides and the notes pages in the PowerPoint presentation to conduct the orientation—using Step 5 as the example. The speaker notes include main points to communicate, questions for discussion and instructions for conducting a “scavenger hunt” using the features of the Toolkit.</li> <li>3. Use the <i>Toolkit Quick Guide</i> (CD or web site) to orient participants to the purpose of the Quick Guide.</li> <li>4. Encourage participants to be active, follow along in the Toolkit as the components are introduced and ask questions as they arise. If they have used the Toolkit in the past, encourage them to share their experiences with the rest of the group.</li> <li>5. Answer any questions raised by participants. Praise and reward active involvement of participants throughout; avoid giving a “talking head” one-sided presentation.</li> </ol> | Slides 4–13, Primary presentation<br><br><i>Stakeholder Engagement Toolkit</i> (one copy for each participant)<br><br>Toolkit Quick Guide and related E-Resources<br><br>Small prizes (e.g., candy, snacks or trinkets)  |
| 10 min<br><br>1.5 hr total         | <b>Break</b> <ol style="list-style-type: none"> <li>1. Meet briefly with small group leaders to prepare for the role play demonstration.</li> </ol>   | Copies of the scenario and character descriptions that will be used in the demonstration.  |
| 45 min<br><br>2.25 hr total        | <b>E. Identify/Plan for Sociocultural Factors</b> <ol style="list-style-type: none"> <li>1. Use <a href="#">slide 14</a> to introduce the topic of Sociocultural Landscape.</li> <li>2. Use <a href="#">slide 15</a> to conduct the brainstorming and discussion as described in the speaker notes.</li> <li>3. Use <a href="#">slide 16</a> to describe the benefits of identifying and planning for these factors (summarized from Step 4 of the Toolkit and discussed briefly during the orientation to the Toolkit). Encourage participants to review Step 4 in the <i>Toolkit</i>.</li> <li>4. Explain that the Toolkit does not contain a tool specific to this stakeholder engagement task so we will be using resources from AVAC’s GPP Blueprint to practice this task.</li> </ol>   | Slides 14–17, Primary presentation<br><br>Photocopies of Study Designs (one copy per participant—choose the study design/designs most appropriate for your participants)<br><a href="#">5-se-sociocultural-small-group-activity.doc</a><br><br>Questions from GPP Blueprint; choose the question or questions that are most appropriate for your participants; trim along dotted lines and place questions into a hat or box (one question per small group)<br><a href="#">5-se-sociocultural-small-group-activity.doc</a><br><br>Flipchart and markers for each small group |

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|                                | <ol style="list-style-type: none"> <li>Use <b>slide 17</b> of the presentation to introduce the small group activity. Follow the instructions in the speaker notes and in the file containing the resources needed for the SocioCultural activity. Monitor the time allocated for each step of the activity.</li> <li>Instruct the small groups to save the flip charts they generated during this activity to use later in the workshop. Answer any questions or note them in the Parking Lot.</li> </ol>   | GPP Blueprint, Section 1.4 Sociocultural Landscape and Section 1.5 Legislation, Guidelines and Standards and Structural Issues (one copy per participant—optional) |
| 30 min<br><br>2.75 hr<br>total | <b>F. Assess Knowledge/Perceptions using the Agree/Disagree Activity</b> <ol style="list-style-type: none"> <li>Explain that the purpose of the session is to practice a technique for exploring the knowledge and the opinions of stakeholders/participants on a number of issues (<b>slide 18</b>).</li> <li>Conduct the reflection activity using <b>slide 19</b>. Summarize participants' responses to transition into the Agree/Disagree activity.</li> <li>Follow the instructions in the speaker notes to conduct the Agree/Disagree activity using the items on <b>slide 20</b>.</li> <li>While conducting the Agree/Disagree activity, emphasize the various ways the activity can be used—challenge participants to think creatively about how they might use it differently from how they may have used it previously.</li> <li>Transition to the next activity.</li> </ol> | Slides 18–20, Primary Presentation<br><br>Three Signs: Agree, Disagree, Not Sure   |
| 15 min<br><br>3 hr<br>total    | <b>G. Establish Norms/Guidelines for Working with Stakeholder Groups</b> <ol style="list-style-type: none"> <li>Use <b>slide 21</b> to introduce the topic of establishing group norms.</li> <li>Follow the instructions in the speaker notes (<b>slide 22</b>) to guide the reflection activity. Mention the group norms activity from earlier in the session.</li> <li>Initiate a discussion using the questions on <b>slide 23</b>. Probe for the suggested responses.</li> <li>Present the summary of key messages about the importance of establishing group norms using the bullets/speaker notes on <b>slide 24</b>. Emphasize that norms and guidelines are not limited to just face-to-face meetings. Use the questions in the speaker notes to wrap up the discussion of norms.</li> </ol>   | Slides 21–24, Primary Presentation   |

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|                                | 5. Ask participants if they have any additional questions or comments before moving on to the next topic.   |   |
| 55 min<br><br>3.85 hr<br>total | <p><b>H. Use Role Plays to Build Stakeholder Capacity to Facilitate Agreements</b></p> <ol style="list-style-type: none"> <li>1. Follow the instructions in the document, <i>Facilitating Role Plays</i> to prepare for and conduct this activity after introducing it using the slides in the primary presentation as described in the steps below. Since the intent of this session is to teach participants how to use role plays in their stakeholder engagement activities, each participant will also be receiving a copy of <i>Facilitating Role Plays</i> to use and take home with them.</li> <li>2. Explain that the purpose of the session is to practice using scripted role plays and a skill's checklist—a technique that participants may find useful for building capacity among stakeholders (slide 25).</li> <li>3. Use slide 26 to guide the reflection activity and group discussion about how role plays they have conducted or participated in were configured, so that participants can appreciate how this technique is similar or different.</li> <li>4. Explain the benefits of enhancing role plays with a script and checklist using slide 27. Introduce the Facilitating Agreement checklist that will be used by observers during the role plays.</li> <li>5. Tell participants that they will use scripted role plays (which include the list of sociocultural factors generated during activity E) and the checklist to practice a technique for facilitating agreement during group discussions (slide 28).</li> <li>6. Conduct a brief demonstration of how to conduct a scripted role play with the help of your co-facilitator and the small group assistants/volunteers (who were briefed about their roles during the break). Ask the participants to find the role play materials and follow along as you review each of the steps. Distribute the copies of the scenarios and role descriptions to each small group. Use slide 29 and the background materials (included in the Facilitating Role Plays handout) to provide instructions to the participants.</li> <li>7. Keep time for the participants as they move through each phase of preparing for and conducting their role plays. Answer questions as needed.</li> </ol> | <p>Slides 25–31, Primary Presentation</p> <p>Participant Handout: <i>Facilitating Role Plays</i> (one per participant to be distributed after the role play activity)</p> <p>Copies of scenarios and character descriptions to use during the role play activity (provide copies as described in <a href="#">6-se-facilitating-role-plays.doc</a>)</p> <p>Flip chart and markers (one set for each small group)</p> <p>Job aids, tools or other props to use in role plays (if needed)</p> <p>List of sociocultural factors generated by the small groups during activity E</p> |

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|   | <p>8. At the conclusion of the role play, display <a href="#">slide 30</a> and instruct the participants to process the role play in their small group. [If time permits, provide another scenario to each group and instruct the group members to switch roles and repeat the steps. Ideally each participant should have an opportunity to practice the role of the CLO/facilitator but that is not feasible in a half-day workshop. If the workshop spans several days, role play opportunities can be interspersed with other activities so that the exercise does not become tedious from repetition. If there is not sufficient time for each participant to practice every skill, ensure that practice opportunities are distributed as evenly as possible among participants.]</p> <p>9. Use the questions on <a href="#">slide 31</a> to process the role play activity with the entire group.</p> <p>10. Ask participants if they have any additional questions or comments before moving on to the next topic.</p>  |   |
| <p>5 min</p> <p><a href="#">4 hours</a></p> | <p><b>I. Session Wrap Up and Evaluation</b></p> <ol style="list-style-type: none"> <li>1. Use the flip chart showing the Objectives/Agenda to quickly review the activities and the lessons learned that participants should be taking home with them.</li> <li>2. Revisit any items that were recorded in the “Parking Lot” but not addressed during the session.</li> <li>3. If time permits, ask participants to gather in a circle and take turns sharing one thing that they are taking away from the session. If time is tight, stay at the tables and ask for responses from several participants.</li> <li>4. Optional: Encourage participants to share any feedback they have about how the session can be improved by talking with one of the facilitators or by posting their ideas on the Suggestions for Improvement flip chart. A sample workshop evaluation is included in the resources if a more formal evaluation is preferred.</li> <li>5. Give each participant two green dots and two red dots. Ask participants to vote on which activities they found most and least beneficial; placing a green dot next to the two activities they found most beneficial and a red dot next to the two activities that they found to be the least beneficial. (<a href="#">slide 32</a>).</li> <li>6. Thank the participants for their participation and for their willingness to share their feedback about how the session can be improved. (<a href="#">slide 33</a>)</li> </ol> | <p>Slides 32–33, Primary Presentation</p> <p>Flip chart for List of Activities (list the titles of the activities conducted during the session leaving space for participants to record their “vote” with the green and red dots)</p> <p>Green sticky dots (two per participant)</p> <p>Red sticky dots (two per participant)</p> <p>Copy of evaluation for each participant<br/> <a href="#">7-se-workshop-evaluation-form.doc</a></p> |