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A WORKSHOP DESIGN
FOR THE TRAINING OF TRAINERS

WASH TECHNICAL REPORT NO. 73

JUNE 1991

WASH

WATER AND SANITATION
FOR HEALTH PROJECT

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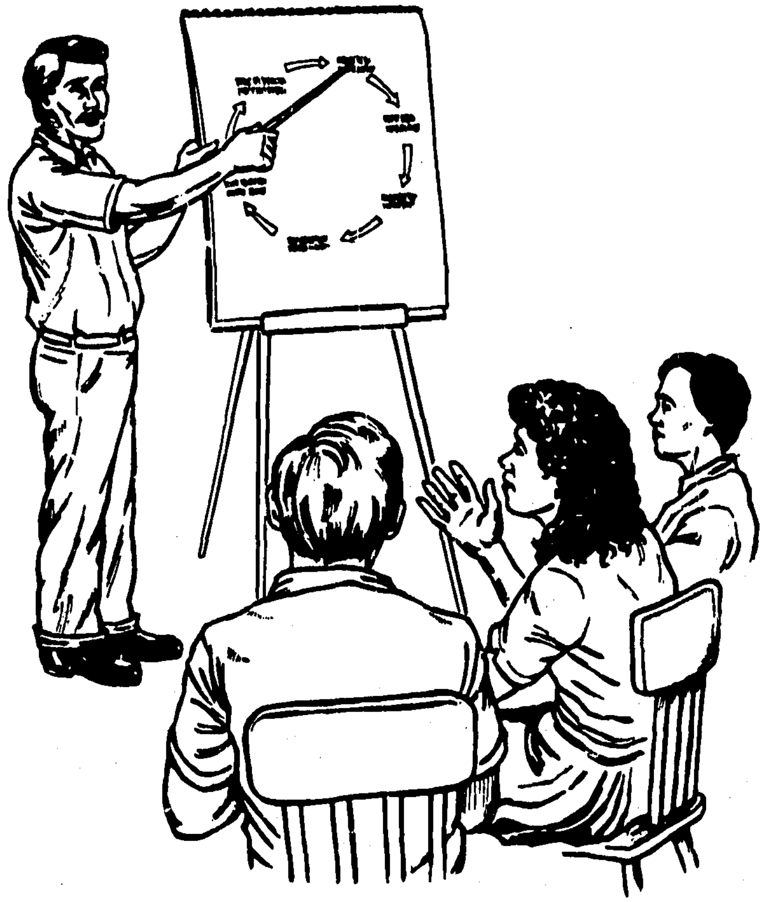

Prepared for the Office of Health,
Bureau for Science and Technology,
U.S. Agency for International Development
under WASH Task No. 032

WASH Technical Report No. 73

A WORKSHOP DESIGN FOR THE TRAINING OF TRAINERS

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by
Graeme Frelick

June 1991

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ABOUT THE AUTHOR

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INTRODUCTION TO THE TRAINING GUIDE

NEEDS ADDRESSED BY WORKSHOP

The workshop presented in this training guide is designed to improve the skills of trainers responsible for training extension or district-level field workers. It may also be useful for training trainers of community-level workers. This training guide is intended to be a complement to the subject matter training guides the WASH Project has developed. It will help trainers to use those guides as well as other training materials.

The two-week workshop focuses on three major aspects:

- Delivery
- Design
- Planning and managing a training event

Delivery skills include group facilitation; managing small group tasks; and using case studies, role plays, lecturettes, demonstrations, and field exercises. These skills are reinforced through practice training sessions. The framework for designing sessions is based on the theory of experiential learning using a seven-step design model. The workshop develops skills in planning and managing an entire training event through a five-day simulation using real-world examples selected by participants.

Participants keep a journal during the workshop to help them plan for application of their new training skills back in their work situations. At the end of the workshop, participants use their journals in a session devoted to back-at-work planning.

ASSUMPTIONS

Adult Learning

Adult learning is approached differently from child learning because adults differ from children in self-concept, experience, readiness to learn, and their perspective on applying what they learn. Adults find learning to be most enjoyable under a variety of circumstances depending on their preferred style of learning. They learn most effectively when they can build on their experiences. Experiential learning provides a framework that enables adults to learn from experience.

The experiential approach is learner centered and allows the participants to manage and share responsibility for their learning with their trainers. Effective training strategies that incorporate experiential learning approaches provide opportunities for a person to engage in an activity, review it critically, abstract useful insight from the analysis, and apply the result in a practical situation. The experiential learning cycle (ELC) divides this learning process into four stages: (1) the experience—the initial activity and the data-producing part of the ELC; (2) processing—reflections on the activity undertaken during the experience; (3) generalizing —drawing conclusions and generalizations stimulated by the first two phases of the cycle; and (4) applying—incorporating what has been learned in the first three phases of the cycle by developing plans for more effective behavior in the future.

Trainers

The trainers using this guide are assumed to have had considerable experience working in training. They should have at least a secondary-level education and significant professional training. They should have at least five years of experience training community-level workers and five years training people at the supervisory level. Ideally, their knowledge should include exposure to (preferably education/training in) at least two of the following areas:

- Community development promotion
- Health/hygiene education methods
- Community water and sanitation

The trainers should also have experience in organizing and facilitating at least 10 workshops using active, participatory adult learning methods. At least three of the workshops should have been for training of trainers (TOT). Further, they should have participated in at least one TOT workshop in which the methodology in this training guide was used. Preferably, the trainers will have participated in more than one TOT workshop, including an advanced-level workshop. They should have skills in designing and conducting sessions using case studies, role plays, and experiential lecturettes. They should also be able to integrate session-level skills with those necessary for planning and managing an entire training event. In short, this guide is not meant to be used by beginning trainers. Training trainers requires a high level of skill and considerable experience.

This guide is designed to be used by two co-trainers. Although only one trainer could use the guide by making some adaptations, delivery with two trainers is strongly recommended and mandatory if there are more than 10 participants. When co-training, trainers share the responsibility for delivering each session, each one preparing and executing one or more steps in alternating fashion. This approach enables trainers to

- Follow more closely the acquisition of knowledge and skills by the participants

- Distribute work better

- Provide greater variety for the participants

- Improve participants' training skills by providing ongoing feedback

- Continue improving designs and session plans for their training programs

- Modify plans more efficiently and rapidly during the implementation of a program in order to respond better to participants' needs

Participants

The participants trained with this guide are assumed to be regional- or national-level personnel with supervisory and training responsibilities for water supply and sanitation or other public health development activities. They should have at least a secondary-level education and significant professional training. They should have at least two years of experience working at the community level and two years at the supervisory/training level.

The participants' knowledge should include exposure to or education/training in at least two of the following areas:

- Community development promotion

- Health/hygiene education methods

- Community water and sanitation

It is assumed that the participants know the subject matter in which they will be training others. This guide is intended to give them the skills they need to design and deliver a training event. The total number of participants should not exceed 20 so that each person will have two opportunities to practice delivering a training session.

OVERVIEW AND GOALS OF THE WORKSHOP

Overview

This training guide describes a 10-day workshop for trainers who will train field workers in performing the tasks needed to work with communities on water and sanitation activities. The training can cover activities involving technical skills, such as latrine construction, spring capping, or well construction, or such process skills as hygiene education or community participation. The guide includes examples of such activities that are drawn from the subject matter training guides developed by the WASH Project.

The workshop begins with some background on experiential training methodology and on facilitation skills important for trainers. Then, the trainers demonstrate the technique of designing and delivering a small group task, which is followed by a session on giving feedback and helping others to give feedback. Next, the trainers continue to demonstrate training techniques, including case studies, role plays, experiential lecturettes, and field exercises. At the end of each demonstration, one or two participants practice the steps used in the delivery of these techniques. Next, trainers lead a simulation of the development of an entire training event. At the end of this simulation, each participant practices leading an entire session selected from the simulated training event. The last day is devoted to back-at-work application, workshop evaluation, and closure.

The workshop design is based on an active, participatory, experience-based learning approach. Participants are expected to take an active part in a variety of activities, such as case studies, role plays, and simulations. This approach also provides time for group discussion of these experiences and their application. Trainers are expected to model the experiential approach throughout the workshop, thereby providing continual reinforcement of this participative methodology.

Overall Goals

By the end of the workshop, participants will be able to

1. Define the basic principles of adult education and of experiential learning
2. Use a design framework for preparing and carrying out training sessions
3. Demonstrate facilitation skills (paraphrasing, asking questions, summarizing)
4. Give and receive constructive feedback

5. Describe the characteristics and the learning purpose of such training techniques as case studies, role plays, small group tasks, lecturettes, demonstrations, and field exercises

6. Deliver a session using one of these training techniques

7. Plan for and manage a training event

8. Adapt this training methodology for use in back-at-work situations

USING THE TRAINING GUIDE

Training Approach

The workshop is designed to attain its overall goals through an approach that is consistent with adult learning needs. The participants are expected to take an active role in their learning based on their experiences in the field of water and sanitation and in training.

Each of the sessions is designed to walk participants through a series of steps intended to maximize what they are learning by first experiencing a presentation (which may be a case study, an instrument, a small group task, a role play, or a short interactive lecturette), then analyzing it, drawing conclusions about it, and looking for ways to apply what they have learned to their own situation. Each session is therefore structured as outlined below.

1. <u>Introduction</u>

    - Questions to involve participants, based on their experiences
    - Presentation of session objectives

2. <u>Presentation or Exercise</u>

    - Short lecture, case study, group task, discussion, role play, practice training, or the like

3. <u>Analysis and Reflection Questions</u>

    - Questions designed to get participants to think critically about the previous group task, case study, role play, practice training, simulation, or other activity

4. Conclusions

- Questions to generalize, compare the meaning derived from this experience with that of similar experiences, and identify the key areas of learning

5. Wrap Up

- Questions to help participants look at applications of what they have learned

- Brief summary of the session and review of the objectives

Training Site Requirements

This workshop requires a room large enough for 20 participants and two smaller break-out rooms that can accommodate 8 to 10 participants. The participants should sit at tables with five or six chairs each. The site may be a hotel or a training institute. Ideally, the trainers will have three or four flipchart easels and plenty of paper, markers, and tape. Two sets of video cameras, recorders, and monitors will greatly enhance the practice training sessions.

Workshop Schedule

The workshop schedule is shown at the end of this section.

Options for Adapting the Workshop Design

The recommended duration of the training program in this guide is 10 days over a consecutive two-week period. Ten days is considered the minimum time necessary to give participants both a background in experiential training methodology and an adequate amount of practice using experiential training techniques. However, for a variety of financial and other reasons, it may not be possible to conduct the workshop over a consecutive two-week period. The following are some options for adapting this design to different time frames.

Option I—Two separate weeks with a time interval

One option is to divide the workshop into two one-week workshops, separated in time by a period of three to six months. In this situation, it would be advisable to lengthen each of the two workshops from 5 to 6 days, for a total of 12 training days:

> In Workshop I, keep the full five days of Week One and adapt the sessions from Day Five of Week Two: Sessions 20—"Back-at-Work Plan" and 21—"Workshop Evaluation and Closing Ceremonies." This additional day gives

participants the full benefit of Week One in the current design, time to plan what they will do in between the two workshops, and time to conduct a proper evaluation and closure of Workshop I.

In Workshop II, the first day can be devoted to debriefing participants on their experiences in the field and to reviewing those skill and knowledge areas from Workshop I that need to be reinforced. For the remaining days of Workshop II, trainers can proceed with the five days of Week Two, as described in this guide.

Option II—A one-week workshop

In some cases, users of this guide may only have a one-week period during which to conduct a TOT event. The recommended option in this situation is to conduct a six-day workshop:

> Use all the sessions from Day One through Day Five in Week One; then, for the sixth day, adapt Sessions 20 and 21 from Day Five of Week Two in order to lead participants through some application planning, a workshop evaluation, and a closing ceremony.

It is possible, though less desirable, to use this guide for a one-week, five-day workshop:

> Use Sessions 1 through 9 in Day One through the morning of Day Five of Week One; then, for the afternoon of the fifth day, use much shortened versions of Sessions 20 and 21 from Day Five of Week Two to do application planning, a workshop evaluation, and a closing ceremony.

PREPARATION FOR THE WORKSHOP

This workshop requires careful planning; many arrangements must be made prior to the start of training. The following table indicates the key steps and time frames for planning and implementing the workshop.

Activity	Time Completed Before Workshop
Recruit and select participants	2 months
Identify/hire training staff (trainers, workshop coordinators, and site supervisors)	2 months
Identify learning needs and roles and experiences of participants	2 months

Select an appropriate training site	2 months
Arrange staff lodging and meals	1-2 months
Arrange all necessary transportation	1 month
Prepare needed workshop materials and handouts	1 month
Prepare for training	2 weeks
Conduct final preparation at training site	2 days
Begin training	

Workshop Schedule

WEEK 1

TIME	DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
8 am	(1) Opening Ceremony Ice Breaker Expectations Goals/Schedule Norms (2.5 hr.)	(3) Facilitation Skills: Paraphrasing, Asking Questions, Summarizing, and Using Encouragers (3.5 hr.)	(5) Giving and Helping Others Give Feedback (2 hr.) (6) Case Study Clinic (3.5 hr.)	(8) Lecturettes and Demonstrations/ Preparation for Practice (3.5 hr.)	(9) Practice Training Round One
12 p.m.	L	U	N	C	H
2 p.m.	(2) Principles of Adult Education and Experiential Learning (3.5 hr.)	(4) Small Group Task Clinic (3.5 hr.)	(6) Case Study Clinic (7) Session Design Framework (1.5 hr.)	(9) Practice Training Round One (7 hr., 45 min.)	(9) Practice Training Round One (10) Field Exercises (2 hr., 10 min.) (11) Week One Evaluation (30 min.)
6 p.m.	End	End	End	End	End

Workshop Schedule

WEEK 2

TIME	DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
8 am	(12) Role Plays (2 hr., 15 min.) (13) Planning and Managing a Training Event: Role of the Trainer (2 hr., 45 min.)	(14) 1. Assessing Training Needs (15) Planning and Managing a Training Event: 2. Training Development Program (5.5 hr.)	(16) Planning and Managing a Training Event: 3. Organizing the Event (1 hr., 45 min.) (17) Planning and Managing a Training Event: 4. Evaluation of Training (3 hr., 15 min.)	(19) Practice Training Round Two (7 hr., 45 min.)	(19) Practice Training Round Two (20) Back-at-Work Plan (2 hr., 45 min.)
12 p.m.	L	U	N	C	H
2 p.m.	(13) Role of the Trainer (14) Planning and Managing a Training Event: 1. Assessing Training Needs (2 hr., 45 min.)	(15) 2. Training Program Development	(17) 4. Evaluation of Training (18) Preparation of Practice Training Round Two (2 hr.)	(19) Practice Training Round Two	(21) Workshop Evaluation and Closing Ceremonies (3 hr.)
6 p.m.	End	End	End	End	End

GUIDE TO SESSION 1: OPENING CEREMONY AND INTRODUCTION TO THE WORKSHOP

Total Time: 2.5 hours

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Welcome and Official Opening Comments	Presentation	40 minutes	Welcoming Package	
2. Introductions	Pair Interviews	35 minutes		A. Interview Questions
3. Expectations	Individual Small Group Tasks and Discussion	35 minutes		B. Individual Task C. Expectations Task
4. Overall Workshop Goals	Presentation and Discussion	15 minutes	Handout 1-1: Overall Workshop Goals	D. Workshop Goals
5. Workshop Schedule	Presentation and Discussion	10 minutes	Handout 1-2: Workshop Schedule	
6. Workshop Norms	Presentation and Discussion	10 minutes		E. Workshop Norms
7. Wrap Up	Presentation	5 minutes		

SESSION 1

OPENING CEREMONY AND INTRODUCTION TO THE WORKSHOP

Total Time: 2.5 hours

OBJECTIVES

By the end of the session participants will have

- Become acquainted
- Clarified their expectations about the workshop
- Reviewed the workshop goals and schedule
- Discussed norms of behavior for the workshop

OVERVIEW

The opening session sets the tone for the entire workshop. After the official opening comments, participants have a chance to get to know each other better through an ice-breaking activity. Then they discuss their expectations about the workshop. Trainers review those expectations to see which ones are covered by the overall workshop goals and schedule. Participants therefore understand which expectations will be met and how they can take responsibility for addressing unmet expectations outside of formal workshop sessions. The session ends with a discussion of the norms of behavior that will be followed throughout the workshop.

The session may begin with official opening ceremonies or comments in countries where it is common for government or program officials to say a few words at the start of a workshop. Trainers need to plan carefully and coordinate such activities before the session begins.

Although this session should take about 2.5 hours, the entire morning has been allocated. This will allow for a late start or for a longer opening ceremony, if required.

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PROCEDURES

1. Welcome and Official Opening Comments — Time: 40 minutes

Introduce yourself and welcome the participants. Explain who is sponsoring the workshop.

Introduce any government and community officials and ask them to say a few words. Set aside about 30 minutes for speeches by the guests.

Explain the overall purpose of the workshop, focusing on the improvement of training skills by using an active, participative methodology that has proven effective for the training of field workers as well as managers in environmental health projects throughout the world. The workshop will draw on the practical experience that participants have gained in the field. It is structured to involve their active participation in sharing their current knowledge and skills as they learn new ideas and develop new skills.

Explain that you will go into fuller detail about the workshop in a moment after the guests have left. The guests may now leave. Distribute the welcoming package.

2. Introductions — Time: 35 minutes

Point out that you want participants to start with an exercise that will help them get to know each other in an informal atmosphere. Ask participants to turn to someone they do not know well and to get to know that person by interviewing him or her for five minutes. Suggest that they ask the questions presented on Flipchart A: Interview Questions:

- What is your name and what do you like to be called?
- Where are you from?
- Where have you been working, and for how long?
- What is the most interesting experience you have had either as a trainer or as a participant in a training program?
- Take 10 minutes for this interview, 5 minutes per person.

Tell the pairs to be prepared to introduce their partner to the rest of the group.

When the interviews are finished, start by introducing your co-trainer in less than a minute in a light, relaxed manner to set an example for the group. Then ask for volunteers. Try to keep the introductions brief. Explain that everyone will have a chance to become better acquainted during the rest of the workshop.

3. Expectations

Time: 35 minutes

Explain the importance of discussing their expectations of the workshop. Say that you wish to discuss what they hope to accomplish during the workshop so that the trainers can assess which parts of the workshop will meet participants' needs and which needs may either not be addressed or not dealt with in much depth. In addition, discussing their expectations will help identify which topics should be particularly stressed.

Display Flipchart B: Individual Task: Write down individually what you expect to accomplish or get out of this workshop.

Give them about three minutes to write.

Display Flipchart C: Expectations Task and explain it as follows:

- In groups of four, share your expectations
- Agree on two to four expectations that you all share
- Select someone to present your list of two to four expectations to the entire group

Give them 15 minutes to finish this task. Inform them when they have 5 minutes left.

Have someone from each group present the group's expectations. Record the expectations on a flipchart. Do not repeat expectations already listed, but note the one being repeated with a mark. After all the groups have reported out:

- Point out the most commonly held expectations
- Ask groups to explain unclear expectations
- If an expectation is outside the purpose of the workshop, ask if everyone wants to spend some time on it during the evenings, or if they can meet it on their own (see "Trainer Notes" for more on this type of situation)

Explain that you will now present the workshop goals and compare them with their expectations.

4. Overall Workshop Goals

Time: 15 minutes

Distribute Handout 1-1: Overall Workshop Goals. Have the same list of goals on Flipchart D: Workshop Goals. Ask the participants to read along as you present the goals. Clarify any goals that were not clear and refer to the list of expectations to show where they are covered by a goal.

Explain that you will now turn to the workshop schedule to show when participants' expectations and the workshop goals will be met over the course of the workshop.

5. Workshop Schedule

Time: 10 minutes

Distribute Handout 1-2: Workshop Schedule. Go over the main session headings in the schedule. Point out the following while going over the schedule:

- Time frames
- Classroom sessions
- Field exercises

Make the following points about the workshop methodology:

- Use of small and large group discussions to encourage active participation
- Use of presentations in combination with case studies, role plays, and practical tasks to create an active learning environment

6. Workshop Norms

Time: 10 minutes

Explain that so far you have looked at *what* participants will learn. However, in order to accomplish the workshop goals within the scheduled time, everyone must agree on *how* that learning can be done most effectively. Say that you propose these norms to help everyone work and learn better together as a group.

Display Flipchart E: Workshop Norms as follows:

- Share responsibility for learning

- Participate actively in all session activities
- Start and end sessions on time
- Respect the views of other participants
- Help one another
- Refrain from smoking in the training room

Ask participants if they agree with these norms and have any others to add. Discuss the norms and seek common agreement on following them.

7. Wrap Up

Time: 5 minutes

Thank them for their participation so far in the workshop. Ask them to make an effort to remember the goals, the schedule, and the norms and what everyone has agreed to do in order to make the workshop run smoothly so that participants will enjoy themselves and learn.

Notes to the trainer

1. It is important for workshop participants to think about and express their expectations before reviewing the goals and schedule. They will work better together if they realize they have a common set of expectations. They are also more likely to accept the goals and schedule if they are related to their expectations.

   Do not spend a lot of time discussing those expectations that are outside the purpose of the workshop. Although it is important to discuss these expectations and try to adapt the workshop to meet them if possible, only small changes in the goals or schedule should be made at this time.

   The discussion of participant expectations can be made easier by providing the intended participants with information about the purpose and structure of the workshop before they arrive.

2. Keep the schedule and flipcharts of the goals and norms posted in the classroom so that you can refer to them throughout the workshop.

MATERIALS

Welcoming package for participants with pads and pencils
Handout 1-1: Overall Workshop Goals
Handout 1-2: Workshop Schedule

Flipchart A: Interview Questions
Flipchart B: Individual Task
Flipchart C: Expectations Task
Flipchart D: Workshop Goals
Flipchart E: Workshop Norms

GUIDE TO SESSION 2: PRINCIPLES OF ADULT EDUCATION AND EXPERIENTIAL LEARNING

Total Time: 3.5 hours

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Questions and Presentation	10 minutes		A. Session 2 Objectives
2. Training Inventory	Individual Task, Small Group Task, and Report Out	60 minutes	Handout 2-1: Training Inventory Handout 2-2: Training Inventory Scoring Sheet	B. Individual Task Instructions C. Small Group Task Instructions
3. Three Training and Learning Styles	Presentation and Discussion	20 minutes	Handout 2-3: Training Inventory Interpretation Work Sheet	D. Three Training and Learning Styles
4. Demonstration of the Experiential Learning Cycle	Exercise, Presentation, and Discussion	45 minutes		E. Objective of Exercise F. Instructions for the Exercise
5. The Experiential Learning Cycle	Presentation and Discussion	45 minutes	Handout 2-4: The Experiential Approach to Training	G. Analysis of Steps in Exercise H. The Experiential Learning Cycle
6. Conclusions	Discussion	15 minutes	Handout 2-5: Traditional and Adult Education	
7. Wrap Up/Journal	Discussion and Presentation/ Individual Task	15 minutes	Handout 2-6: Journal	

SESSION 2

PRINCIPLES OF ADULT EDUCATION AND EXPERIENTIAL LEARNING

Total Time: 3.5 hours

OBJECTIVES

By the end of the session the participants will be able to

- Identify some assumptions about the way adults learn
- Describe how those assumptions affect the way people view training
- List the major components of the experiential learning cycle

OVERVIEW

This session explores the principles of adult learning and the experiential learning cycle (ELC). The basic premise is that adults learn differently from children and our training approach should reflect those differences. The ELC is the training approach that underpins the training guide. This session provides the conceptual framework for the workshop.

This session begins with the Training Inventory, an instrument that participants fill out to identify their preferred training style and learn about the predominant styles of learning. In the next part of the session, trainers present a demonstration session that illustrates the steps in the ELC. The trainers conclude with a presentation of the ELC that draws on this demonstration.

PROCEDURE

1. Introduction

Time: 10 minutes

Begin this session in a relaxed way; ask people how they feel, and joke a bit if appropriate. Then ask a few questions such as the following, making sure the answers are brief.

- What are some differences between the way adults and children learn?

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- What are some examples of learning experiences that were particularly meaningful to you?

Some of the key differences between the way adults and children learn might be that children need more direction, have fewer life experiences, are less self-motivated to learn, and so on.

Explain that adult learning is approached differently from child learning because adults differ from children in self-concept, experience, readiness to learn, and perspective on applying what they learn. Adults find learning to be most enjoyable under a variety of circumstances depending on their preferred style of learning.

Introduce the objectives on Flipchart A: Session 2 Objectives.

2. Training Inventory

Time: 60 minutes

Say that you want to start this session by looking at some of their assumptions about how adults learn.

Explain that you want the participants to examine how they think a training event should be conducted, one that would be comfortable for them as a trainer, or as a participant. You will be asking them to do this by filling out a two-page training inventory. This inventory consists of 30 statements that reflect preferences trainers and participants might have for how different aspects of a training event for adults should be conducted. Participants should put a check mark next to the statements that reflect their preferences and leave the others blank.

Make sure they understand that this is not a test. It is for their own use and will not be handed in. Then distribute Handout 2-1: Training Inventory. Use Flipchart B: Individual Task Instructions to explain the instructions once more before they fill out the inventory.

Individual Task

- Read and fill out the Training Inventory
- Leave blank the statements that do not reflect your preferences
- Take 10 minutes for this exercise

Suggest that they fill out the inventory quickly. If they have problems with some statements, clarify them. However, if they seem to be getting stuck, tell them to leave that statement blank.

When they have finished filling out the inventory, distribute Handout 2-2: Training Inventory Scoring Sheet. Explain the scoring sheet by telling them to look at the number next to those statements they checked on the Training Inventory and place a check mark next to the corresponding number on the scoring sheet, leaving blank those numbers that are blank on the inventory. Then, they should calculate the total number of checks in each column (columns A, B, and C), giving each check a value of "1." Give them five minutes for this task.

Ask all those who scored highest in the "A" column to raise their hands and then write the number on a flipchart or a chalkboard. Do the same for "B" and "C." If you have a fairly even distribution of people in each of the categories, divide them into three groups according to their highest score. If not, you will probably have a very large group under "B," a small group under "A," and possibly no one under "C." In that case, ask anyone with a score of "5" or more in "A" or "C" to join those respective groups. If one of the groups still exceeds six in number, break it into two groups.

Once they have formed groups, give the task on Flipchart C: Small Group Task Instructions as follows:

Group Task

- Share your scores and discuss them briefly
- Discuss your assumptions about how adults learn (how you feel adults learn best)
- Choose two or three of the assumptions that best reflect how people in your group feel
- Prepare to report out
- Take 20 minutes for this task

Ask each group to write their assumptions on a flipchart and report out briefly. Note the differences and similarities between the assumptions of each group. The reports and discussion should last no more than 20 minutes.

3. Three Training and Learning Styles — Time: 20 minutes

Make a presentation on the three training and learning styles—dependent, collaborative, and independent, showing the learning needs and trainer roles for each style. Explain that trainers tend to make assumptions about how people will learn without carefully analyzing their participants' preferred learning styles and needs or their own predominant styles of training that have an impact on learners. The three predominant learning and corresponding training styles are (1) Type A—Dependent (learner)—Directive (trainer); (2) Type B—Collaborative (both learner and trainer); and (3) Type C—Independent (learner)—Facilitative (trainer). There is no one "right" learning or training style. All learning must be approached according to the needs of the learner and the circumstances of the situation.

Ask participants for examples of trainer behaviors and then learner behaviors for each style. Use Handout 2-3: Training Inventory Interpretation Work Sheet to guide your preparation of this presentation and discussion and to develop Flipchart D: Three Training and Learning Styles. On Flipchart D, list the three styles and the learning needs and trainer roles that correspond to each one. Use this flipchart during the presentation. Tell participants they do not need to take notes because you will give them a handout.

Indicate that these styles are meant to provide a framework for analyzing learner needs and trainer roles. They are not intended to show that one style is better than another. There is no one right way to learn or train. Each of these styles may be appropriate in a given situation, or even a combination of styles.

Ask them what they think are the principal styles used in this workshop. The answers will probably be between "A" and "B." Give examples of when you will use more of an "A" style or a "B" style.

Distribute Handout 2-3 when you have completed the presentation.

4. Demonstration of the ELC — Time: 45 minutes

Explain that you now want to examine a framework that shows how adults learn. Remind them of the point made in the introduction about how adults learn best by building on their existing knowledge and by being actively involved in the learning process. Say that there is a series of steps in this learning process that you want to demonstrate. You will use an exercise in communication for this demonstration.

Ask them to understand that if you cut off some of the discussion that follows the exercises, it is because your primary goal is to demonstrate the stages of experiential learning. Encourage them to remember the questions you ask during the demonstration so that they can analyze them later.

Begin the demonstration. Below are the recommended steps and timing (in parentheses) for this demonstration.

COMMUNICATION EXERCISE

A. Introduction (3 minutes)

Explain that this exercise is a demonstration of the experiential learning model, and that a discussion of the model will follow at the end of the demonstration. The subject of the demonstration is communication. Ask participants to act as they would in a regular session, while observing the different steps the trainers use in delivering the session.

B. Objective (2 minutes)

Flipchart E: Objective of the Exercise: "Discuss some of the factors that can block effective oral communication."

C. Experience (10 minutes)

Present the following procedure on Flipchart F: Instructions for the Exercise:

Procedure:
- — Divide into two or three groups, each forming a line (no more than eight per group, no fewer than six).
- — The first person in each line receives a message.
- — He or she should whisper that message (only once) to the next person, and so on.
- — The last person in each group writes the message on a flipchart.
- — The first group to finish and get the most accurate message wins.

Message: "Independent learners usually prefer a facilitative trainer who helps them find their own solutions."

Write the message on a flipchart—turn it around so no one can see it. Invite the first person in each line to come and read the message. At the end, show everyone the original message and compare it with the ones participants wrote on the flipchart.

D. Process (7 minutes)

Ask: "How was this exercise? Easy? Difficult? Why?"

E. Generalize (6 minutes)

Ask: "What conclusions can we draw from the experience about what blocks effective oral communication?"

F. Apply (5 minutes)

Ask: "What can we do during this workshop to overcome the things that block effective oral communication?"

G. Wrap Up (2 minutes)

Summarize their main conclusions and review the objective, asking if it was reached.

5. The Experiential Learning Cycle — Time: 45 minutes

Ask participants to recall the different questions you asked and the tasks that you gave. Write the main questions and tasks in the order of presentation on Flipchart G: Analysis of Steps in Exercise. Leave blank spaces above the tasks and questions so that you can later add the steps in the ELC: experience, process, generalize, and apply.

Explain that adults learn most effectively when they can build on their experiences. Experiential learning provides a framework that enables adults to learn from experience. The experiential approach is learner centered and allows the participants to manage and share responsibility for their learning with their trainers. Effective training strategies that incorporate experiential learning approaches provide opportunities for a person to engage in an activity, review it critically, abstract useful insight from the analysis, and apply the result in a practical situation. The ELC divides this learning process into four stages: (1) the experience—the initial activity and the data-producing part of the ELC; (2) processing—reflections on the activity undertaken during the experience; (3) generalizing—drawing conclusions and generalizations stimulated by the first two phases of the cycle; and (4) applying—incorporating what has been learned in the first three phases of the cycle by developing plans for more effective behavior in the future.

As you add each step to the flipchart, explain what is happening at each step and why, using Handout 2-4: The Experiential Approach to Training as a guide. Then display Flipchart H: The Experiential Learning Cycle, on which the cycle on page 1 of Handout 2-4 should be reproduced. Explain each step again and show how the steps fit into a learning cycle.

If the concept of the ELC seems difficult for the participants, reassure them by saying that these steps will be reviewed and analyzed several times throughout the workshop; tell them that this session is meant as an introduction. Distribute Handout 2-4.

6. Conclusions

Time: 15 minutes

Ask what conclusions they can draw about assumptions of how adults learn.

Ask what are the most important things they learned during this session. Write their answers on a flipchart. Distribute Handout 2-5: Traditional and Adult Education and explain that it summarizes some of the main points about adult education.

Refer to their conclusions and things learned and ask what they might do differently now, and what they will want to emphasize when they train in their work situation. Then ask what are some things both participants and trainers can do during this training program to apply what they have learned.

7. Wrap Up/Journal

Time: 15 minutes

Summarize what has been learned during the session and review the session objectives.

Distribute Handout 2-6: Journal. Explain that this journal will be an important part of their back-at-work planning at the end of the workshop. At the end of each major session, they will record what they have learned so as not to forget it. They will also use the journal to write down some ways of applying what has been learned in the workshop. Give them 10 minutes to fill out this first journal.

MATERIALS

Handout 2-1: Training Inventory
Handout 2-2: Training Inventory Scoring Sheet
Handout 2-3: Training Inventory Interpretation Work Sheet
Handout 2-4: The Experiential Approach to Training
Handout 2-5: Traditional and Adult Education
Handout 2-6: Journal

Flipchart A: Session 2 Objectives
Flipchart B: Individual Task Instructions
Flipchart C: Small Group Task Instructions
Flipchart D: Three Training and Learning Styles
Flipchart E: Objective of the Exercise
Flipchart F: Instructions for the Exercise
Flipchart G: Analysis of Steps in Exercise
Flipchart H: The Experiential Learning Cycle

GUIDE TO SESSION 3: FACILITATION SKILLS—PARAPHRASING, ASKING QUESTIONS, SUMMARIZING, AND USING ENCOURAGERS

Total Time: 3.5 hours

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Questions and Presentation	10 minutes		A. Session 3 Objectives
2. Analysis of Paraphrasing	Role Play and Presentation	30 minutes	Handout 3-1A: Extension Agent Role Play Sheet Handout 3-1B: Committee President Role Play Sheet	B. Role Play Instructions C. Paraphrasing—Key Points
3. Practice Paraphrasing	Role Play and Discussion	25 minutes		
4. Analysis of Asking Questions, Summarizing, and Using Encouragers	Presentation	25 minutes		D. Closed and Open-ended Questions E. Starter Phrases for Summarizing F. Encouragers
5. Demonstrate Facilitation Skills	Demonstration and Discussion	30 minutes		
6. Practice Facilitation Skills	Individual/Small Group Task and Discussion	60 minutes	Handout 3-2: Individual and Group Task Instructions	
7. Conclusions	Discussion	20 minutes	Handout 3-3: Individual Generalizing and Applying Task	
8. Wrap Up/Journal	Discussion and Presentation/Individual Task	10 minutes	Handout 3-4: Facilitation Skills Handout 3-5: Journal	

SESSION 3

FACILITATION SKILLS—PARAPHRASING, ASKING QUESTIONS, SUMMARIZING, AND USING ENCOURAGERS

Total Time: 3.5 hours

OBJECTIVES

By the end of the session the participants will be able to

- Demonstrate effective facilitation skills, such as paraphrasing, asking questions, summarizing, and using encouragers
- Explain how these facilitation skills are important for managing discussions effectively

OVERVIEW

Facilitation skills are an important element in delivering effective training. Trainers must be able to use a variety of communication techniques in order to create an environment that enables participants in a training event to participate actively in the learning process. Although the range of communication skills necessary for effective facilitation encompasses most of human interchange, the skills of paraphrasing, asking open-ended questions, summarizing, and using encouragers are particularly important. Further, they can be learned in a relatively short time. This session offers an opportunity to learn and practice these four skills.

The session begins with participants analyzing and practicing paraphrasing using a role play. Next, they practice using open-ended questions, summarizing, and using encouragers in small group discussions.

PROCEDURES

1. Introduction

Time: 10 minutes

Start the session by giving the overview in your own words.

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Introduce Flipchart A: Session 3 Objectives by explaining that this session is intended to help participants learn ways to make sure that effective communication takes place and recognize how important it is for trainers to master communication skills in order to facilitate group discussions.

2. Analysis of Paraphrasing

Time: 30 minutes

Explain to the group that they will work in teams of two in order to practice how to communicate. Each person will be assigned either the role of extension agent or committee president. Both will be given a sheet of paper that gives them information on the role they are to play.

Divide the participants into two groups. Ask those in one group to play the role of the committee president. Ask those in the other group to be the extension agent. Give one group Handout 3-1A: Extension Agent Role Play Sheet and the other group Handout 3-1B: Committee President Role Play Sheet.

Allow the groups a few minutes to read their situations. Then ask each group if their role is clear and clarify the role if necessary.

In each group (separately) give the following instructions using Flipchart B: Role Play Instructions.

Extension Agent:	It is your task to convince the committee president that it is critical to collect information using a survey in order to begin the hygiene education campaign. Do this in any way you think appropriate.
Committee President:	It is your task to try to convince the extension agent that he does not need to collect information with a survey, and that he should change the way he works so that he is more flexible in scheduling work with committee members. Do this in any way that you think is appropriate.

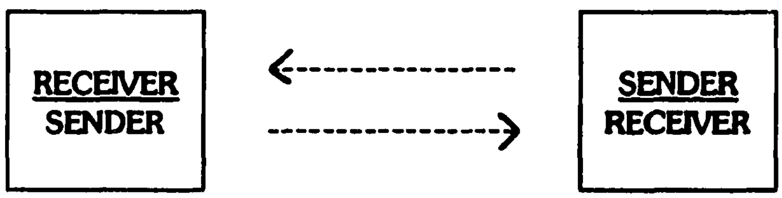
Give both groups a few minutes to discuss how they are going to approach the task.

Ask them to form pairs of extension workers and committee presidents and to begin trying out their strategies on each other. Ask them to act the way they normally would, and not be unnecessarily difficult. Give them two to three minutes to start work on this role play, then stop the action. Ask them to remain where they are and to write down where they are now in their discussion and where they want to go to accomplish their strategies. Tell them that they will continue their role play in a few minutes.

Explain that you will discuss and demonstrate one of these skills. Then they will continue the role play and try this skill out themselves.

Use Handout 3-4: Facilitation Skills (distributed at end of session) to prepare and deliver a lecturette on paraphrasing. Include the following key points, which should be summarized on Flipchart C: Paraphrasing—Key Points:

> Communication seems like a simple process of sending and receiving information among people.



> But it is one of the more complex things that people do. We may think we are sending a clear message, but the person who receives it hears it differently from the way it was intended. Sometimes we are distracted and do not "hear" or listen very carefully. One way to ensure that communication is really taking place is to use *paraphrasing.*

> Paraphrasing is "capturing the meaning of a statement and saying it back to the other person in your own words":

Demonstrate the process of paraphrasing by asking for a volunteer to discuss a subject of your choosing, for example, "How is the work going in your region?" As you talk with the participant, make a conscious effort to paraphrase at appropriate times using different phrases, such as the following:

> "You are saying..." [then say in your own words what has been said]

> "In other words..."

> "I gather that..."

"If I understood what you are saying..."

"You mean..."

Ask participants to identify the phrases you used to introduce paraphrasing and write them on a flipchart. Ask them for other examples of introductory phrases.

3. Practice Paraphrasing

Time: 25 minutes

Ask the group to resume their role play by first reviewing their notes to see where they were and then continuing their discussion using a "paraphrasing rule."

> Before you respond to the other person, you must first paraphrase to the satisfaction of the other person.

Allow this exercise to go on for about three minutes. Then stop the role play briefly, instructing the groups to relax and only paraphrase when they find it useful to clarify the communication. Tell them they can now conclude their role play and try to reach an agreement between the extension agent and the committee president. Allow them to continue for another three minutes to conclude their discussion.

Bring the full group back together and hold a discussion by asking them such questions as the following:

- What were your reactions to this exercise? How was it?
- What did using paraphrasing do to the communication process?
- What did the requirement to use the "rule" do to your communication?
- When the "rule" was relaxed, what kind of change took place in communication?

Ask a few generalizing questions, for example:

- What have you found useful about paraphrasing?
- What was easy/difficult?
- What have you learned about paraphrasing?

4. Analysis of Asking Questions, Summarizing, and Using Encouragers

Time: 25 minutes

Explain that paraphrasing is a key facilitation skill. Now you want to spend some time looking at the other facilitation skills: asking questions, summarizing, and using encouragers..

Ask them to explain the difference between closed and open-ended questions.

Display Flipchart D: Closed and Open-ended Questions, a list of some closed and open-ended questions. Encourage them to think of starting open-ended questions with question words, such as what, who, how, where, why, when. List these words on the flipchart. Then ask them to rephrase some of the closed questions on the flipchart to make them open ended.

Examples of questions to write on Flipchart D:

- Are you feeling tired right now?
- Isn't today a nice day?
- Was this last activity useful?
- What did you think of the paraphrasing skit this morning?
- How are you feeling right now?
- When should we take our next break?
- Why am I asking you so many questions?

Ask them to share briefly some of their own experiences with closed and open-ended questions. Then ask for suggestions of ways that could help them remember to ask open-ended questions. Some examples might be (1) writing them down before asking them, (2) thinking about question words before asking someone a question, and (3) deciding what kind of answer they want and whether the question will elicit the desired response.

Next, ask the group to define summarizing. Draw out a definition from the group and write it on a flipchart: "Summarizing is...."

Be aware that every group may define summarizing using slightly different words. It is important for the group to try and come up with its own definition. It may be something like "Summarizing is recalling and stating in a few words the essence or most important points in a conversation."

Present Flipchart E: Starter Phrases for Summarizing. Make sure you have a list of two or three starter phrases, such as

- These seem to be the key ideas you have expressed...
- If I understand you, you feel this way about the situation...

Ask them to add their own examples of starter phrases and write them on the flipchart.

Display Flipchart F: Encouragers. Go over the list of encouragers, drawing from the list of "Other Facilitation Skills" on the last page of Handout 3-4: Facilitation Skills, and explain each one.

5. Demonstrate Facilitation Skills

Time: 30 minutes

Do a quick demonstration of leading a discussion using all of the facilitation skills. Ask for three or four volunteers to be members of an imaginary task force. This task force has been asked by the Minister of Health to make recommendations on ways to improve sanitation practices by the population. You (or the other trainer) are the facilitator for this task force.

Have the volunteers sit in a circle in the middle of the room if possible (fishbowl technique). The other participants are to be observers, who will note down how the facilitator used all of the facilitation skills and the impact of their use on the discussion. When you lead the discussion, explain that you have three items on the agenda: (1) issues and concerns they have about household sanitation practices; (2) possible solutions; and (3) recommendations. Introduce the discussion with open-ended questions related to the first item, paraphrase appropriately, summarize what they said about the first item and move to the second item, doing the same. Stop after the second item (maximum ten minutes) and explain that you will ask for specific recommendations in the next meeting of the task force. Thank them for their participation and ask the observers what they noted. This discussion by the observers works best if it is led by the trainer who was not conducting the demonstration.

6. Practice Facilitation Skills

Time: 60 minutes

Give the task outlined in Handout 3-2: Individual and Group Task Instructions. Then distribute Handout 3-2. Explain that this exercise is an opportunity for them to practice all the skills demonstrated in this session, including asking questions, paraphrasing, and summarizing. If you want to give them the option of discussing a topic other than experiential training, before they go into their group task, lead a brainstorming session of possible topics they might cover. Write them on a flipchart. Encourage participants to choose topics that are narrow in scope, because they will have only five minutes to discuss them.

Give them a few minutes to prepare. When their individual preparation is completed, break participants into two large groups, each with one trainer. Then, in each group, ask for a volunteer who is willing to lead the discussion. Have the volunteer lead the discussion for five minutes.

Watch for examples of paraphrasing, open-ended questions, summarizing, and encouragers. When each person has finished leading the discussion, conduct a brief feedback session. Ask the group for examples they heard of open-ended questions, paraphrasing, and summarizing. Focus mostly on what worked well. Allow this entire discussion to last five minutes, then ask for another volunteer to lead the discussion, either using the questions that person has prepared or picking up where the other person stopped.

Allow the second volunteer to lead the discussion for five minutes. Then, conduct a brief feedback session similar to the first one. Do the same thing for a third person, and a fourth if time permits.

7. Conclusions Time: 20 minutes

Distribute Handout 3-3: Individual Generalizing and Applying Task. When they have completed the task, ask a few participants for examples of their answers to the question about things they have learned in this session. Then ask for a few examples of answers to the question about how those things apply to their work.

8. Wrap Up/Journal Time: 10 minutes

Summarize the main points learned in this session. Distribute Handout 3-4: Facilitation Skills and explain where the sections on paraphrasing, summarizing, asking questions, and using encouragers can be found. Answer any remaining questions about these four skills, then return to the session objectives and see if they have been met. Distribute Handout 3-5: Journal and give them time to fill it out.

MATERIALS

Handout 3-1A: Extension Agent Role Play Sheet
Handout 3-1B: Committee President Role Play Sheet
Handout 3-2: Individual and Group Task Instructions
Handout 3-3: Individual Generalizing and Applying Task
Handout 3-4: Facilitation Skills
Handout 3-5: Journal

Flipchart A: Session 3 Objectives
Flipchart B: Role Play Instructions
Flipchart C: Paraphrasing—Key Points
Flipchart D: Closed and Open-ended Questions
Flipchart E: Starter Phrases for Summarizing
Flipchart F: Encouragers

GUIDE TO SESSION 4: SMALL GROUP TASK CLINIC

Total Time: 3.5 hours

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Presentation and Discussion	10 minutes		A. Session 4 Objectives
2. Examples of Small Group Tasks	Large Group Brainstorming	20 minutes	Handout 4-1: Using Small Groups Handout 4-2: Impact of Latrines Handout 4-3: Making Small Group Work Effective	
3. Procedures for Small Group Tasks	Presentation	35 minutes		B. Procedures for Small Group Tasks
4. Preparation for Practice	Task in Small Groups	45 minutes	Handout 4-4: Using Success Analysis	C. Small Group Task Instructions
5. Small Group Task Practice	Practice	80 minutes		D. Small Group Task Instructions
6. Conclusions	Discussion	10 minutes		
7. Wrap Up/Journal	Discussion and Presentation/Individual Task	10 minutes	Handout 4-5: Journal	

SESSION 4

SMALL GROUP TASK CLINIC

Total Time: 3.5 hours

OBJECTIVES

By the end of the session the participants will be able to

- Identify the characteristics of an effective small group task
- Describe when to use group tasks and for what purpose
- Formulate a small group task
- Lead a small group task
- List some options for small group reports

OVERVIEW

Adults learn best by drawing from their experience and from interacting with other adults. Therefore, adult learners benefit from a training environment that enables them to reflect on several levels: on their own, in a small group, and in a large group. The trainer should vary the training format to allow learning to occur at each of these three levels. This session focuses on the small group level through an approach known as a small group task. A small group task provides opportunities for learners to practice a new skill together or to formulate in their own words newly acquired knowledge. It is one of the more frequently used techniques in experiential training.

When preparing to divide learners into small groups, the challenge for the trainer is to formulate a task that will reinforce knowledge or build skills in a meaningful and efficient way. Therefore, the task must be stated so that it is directly linked to the objectives of a session. It must also be clear and relatively simple, so that learners can begin their work quickly and complete it within a reasonable amount of time.

In this session, the trainers begin by eliciting from participants examples and characteristics of small group tasks, and making a presentation on procedures for managing those tasks. Then, after a period for preparation, participants are divided into two groups. In each group a volunteer sets up a small group task and manages the report out from the small group.

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PROCEDURES

1. Introduction — Time: 10 minutes

Ask participants to identify situations in which they learn best. Ask them to use examples drawing from this workshop and other learning situations.

Encourage them to remember group tasks, such as in Session 3, when they prepared questions to use in leading a group discussion or did role plays. Then explain that this session will focus on small group tasks.

Give an overview of the session in your own words and present the objectives on Flipchart A: Session 4 Objectives.

2. Examples of Small Group Tasks — Time: 20 minutes

Lead a brainstorming session by asking participants to think of situations in a training program in which a small group task might be appropriate. Write their ideas on a flipchart. Then, review their ideas and ask them what the purpose of using this technique would be in each situation. Distribute Handout 4-1: Using Small Groups.

3. Procedures for Small Group Tasks — Time: 35 minutes

Display Flipchart B: Procedures for Small Group Tasks, which should list the four steps and the main points under each step, as shown below.

Explain that there are four basic steps to preparing for a small group task.

A. Link the task to a session objective.

> Analyze whether the objective is aimed at knowledge or skills; for example, the small group task aimed at using facilitation skills in Handout 3-2. Then refer them to Flipchart A: Session 4 Objectives. Ask them which objective this task is linked to (list objective). Identify it as a skill objective.
>
> Then display Flipchart C: Small Group Task Instructions, based on Handout 4-2: Impact of Latrines.
>
> Ask them whether this task is linked to a skill or to a knowledge objective (answer: knowledge objective). Distribute Handout 4-2. Have them compare it with the task

in Handout 3-2. Note that participants are asked to perform an analytical task rather than to demonstrate a skill.

B. Decide whether a small group task is appropriate for reaching that objective.

Ask for some reasons why one might choose to involve the larger group, and why one might choose a small group:

(a) a small group: more people can participate, more examples or ideas may be generated, it varies the format, it moves people around, it increases energy in the group, and so on;

(b) a large group: less time than in a small group, the trainer can add examples and lead the discussion so that it will be more focused, and so on.

Add that you decided to achieve the skill objective in Session 3 in a small group and explain the reason—principally that you wanted participants to practice facilitation skills.

C. Formulate the task.

Describe the steps in a task. Underline the importance of the following considerations in formulating a task.

1. Decide how to group people: look at the total number of participants and decide how many groups make sense; what the size of each group should be (preferably no more than six per group); how you want to divide people up (letting them go where they want, counting off—"1, 2, 3, etc.," or assigning people by name).

   Briefly discuss the pros and cons of each choice.

2. Decide what you want them to accomplish: think of the participants' knowledge and skill level and decide how complex the task should be; look at what you have presented previously and determine how you can integrate it into the task; think of the amount of time you want them to spend on the task.

3. Decide how you want people to report out: written reports on flipcharts, with a person from each group reporting out, or simply posted for the trainer to review; a person in the group writes the report and shares it orally; the trainer asks each group for an example of how they responded to a portion of the task; and so on.

Briefly discuss the pros and cons of these approaches, focusing on decisions about how much time it can take for each group to report out and on the savings in time when the trainer selects sample responses from each group.

D. Write the task.

Make sure the task is clear and that it includes a series of simple and distinct steps; write it on a flipchart or chalkboard, or even on a handout (especially for complex tasks, or if a group is going to another room).

Explain the advantages of a written task, for example, visual reinforcement; easier for people to ask clarifying questions about a particular step; people can refer to it throughout the task.

Ask for the disadvantages of not writting the task, for example, people cannot remember; the trainers may not remember clearly; the task becomes less clear every time the trainer repeats it.

Distribute Handout 4-3: Making Small Group Work Effective. Explain that it summarizes the main points you have made.

4. Preparation for Practice

Time: 45 minutes

Explain that you want them to practice preparing and delivering a small group task. In order to focus on the components of such tasks, say that you will not go beyond the processing step in the experiential learning cycle. The design and delivery of the generalizing and applying steps will be covered in Session 7. Tell them that you will have two sample tasks available to them, one they have already seen, Handout 4-2: Impact of Latrines, and a new one, Handout 4-4: Using Success Analysis. Distribute and discuss Handout 4-4, explaining that the first part provides some background on success analysis (avoid a lengthy discussion of the content), and the second part is the small group task. Divide the large group into groups of five or six people; assign Handout 4-2 to half of the groups and Handout 4-4 to the other half.

Present the task on Flipchart D: Small Group Task Instructions, as follows:

- Read the task assigned to your group
- Discuss how the task was designed, using the four steps listed on Flipchart B: Procedures for Small Group Tasks

- Copy the task onto a flipchart
- Take 25 minutes for this task

Walk around to the different groups, offering to help clarify the task.

When all the groups have finished their task, say you want each group to describe briefly how it analyzed one of the four steps in the procedures for small group tasks. Go from group to group, one step for each one. Take no more than 15 minutes for this discussion.

5. Small Group Task Practice — Time: 80 minutes

Ask for two volunteers from two separate groups to practice presenting their small group task. Break into two groups, with one trainer in each group. Remind them that you want them to present the task, manage the small group work, and lead a reporting out session. Begin the practice session.

Allow the session to last no more than 40 minutes, cutting it off if necessary. If you need to cut it off, act in an encouraging manner, explaining that they should not worry if the session goes over the time at this point because everyone is there to learn the technique, and not necessarily to complete the small group task. If the session has not progressed very far during that time, ask the presenter to describe what he or she would have done to complete the task.

Lead a group discussion. First, ask the group for a step-by-step description of the task presentation and management. Avoid and discourage any evaluative comment at this point. Then ask both the group and the presenter what went well. Keep them focused on what went well, telling them that they can talk about improvements later. Finally, ask everyone for suggestions of improvements. Encourage them to be specific, descriptive, and nonjudgmental.

6. Conclusions — Time: 10 minutes

Ask them what they learned about managing small group tasks. Write the main points on a flipchart.

7. Wrap Up/Journal — Time: 10 minutes

Ask them for a few brief examples of how they might use small group tasks back in their work situations. Then return to the session objectives and ask if they were reached.

Distribute Handout 4-5: Journal and give them a few minutes to record what they have learned in their journal.

MATERIALS

Handout 4-1: Using Small Groups
Handout 4-2: Impact of Latrines
Handout 4-3: Making Small Group Work Effective
Handout 4-4: Using Success Analysis
Handout 4-5: Journal

Flipchart A: Session 4 Objectives
Flipchart B: Procedures for Small Group Tasks
Flipchart C: Small Group Task Instructions
Flipchart D: Small Group Task Instructions

GUIDE TO SESSION 5: GIVING AND HELPING OTHERS GIVE FEEDBACK

Total Time: 2 hours

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Presentation and Discussion	10 minutes		A. Session 5 Objectives
2. Giving and Helping Others Give Feedback	Reading and Presentation	30 minutes	Handout 5-1A: Guidelines for Giving Feedback Handout 5-1B: Helping Others Give Feedback	B. Giving Feedback C. Helping Others Give Feedback
3. Procedure for Practicing Feedback Skills	Task Assignment for Trios	10 minutes	Handouts 5-2A and 5-2B: Feedback Situation 1	D. Feedback Practice Task Instructions, Part 1
4. Practice Feedback Skills	Task in Trios	40 minutes	Handouts 5-2C and 5-2D: Feedback Situation 2	D. Feedback Practice Task Instructions, Part 2
5. Review Skill Practice	Discussion	10 minutes		
6. Conclusions	Discussion	10 minutes		
7. Wrap Up/Journal	Discussion and Presentation/ Individual Task	10 minutes	Handout 5-3: Journal	

SESSION 5

GIVING AND HELPING OTHERS GIVE FEEDBACK

Total Time: 2 hours

OBJECTIVES

By the end of the session the participants will be able to

- List the criteria for giving useful feedback
- List the criteria for helping others give feedback
- Apply these criteria in giving and helping others give feedback

OVERVIEW

Feedback is a process of receiving and evaluating information about our behavior. In particular, it is information about how our behavior affects others. Feedback always involves a communication process, either verbal or nonverbal, intended or unintended. Feedback is also essential to the learning process; trainers regularly give feedback to participants and participants to each other during the course of a workshop.

This session begins with a presentation of some guidelines for giving and helping others give feedback. Participants are then given an opportunity to practice giving and receiving feedback in trios based on a situation between a supervisor and a field worker. The session ends with a discussion of how feedback is given and received in this and other workshops.

PROCEDURES

1. Introduction

Time: 10 minutes

Refer to the previous exercise and ask how participants found out how they were doing when they presented their small group tasks and what kind of impact they were having on the group. Encourage them to think of examples of both verbal and nonverbal feedback. Point out that these are examples of something called "feedback." Link to this session, giving an overview in your own words and present Flipchart A: Session 5 Objectives.

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2. Presentation

Time: 30 minutes

Explain that feedback is a process of receiving and evaluating information about our behavior and that it comes from our day-to-day contacts with people. In particular, it is information about how our behavior affects others. State that feedback always involves a communication process, either verbal or nonverbal, intended or unintended. Finally, show how feedback is essential to the learning process, and explain that trainers and participants must give and receive feedback.

Give examples of feedback that you have received from participants when they indicated their interest in a session, both verbally and nonverbally. Explain how you directed their feedback in the previous session when you asked them to be descriptive and non-judgmental in analyzing the small group task presentations. Ask them why they think you insisted on those rules. Encourage answers such as "being descriptive gives the presenter a clear picture of how others were affected by his or her behavior" and "being judgmental may turn the other person off, or it may be discouraging."

Display Flipchart B: Giving Feedback, which should be based on Handout 5-1A: Guidelines for Giving Feedback. Explain the guidelines, using examples for each one.

Indicate that trainers need to be skilled not only in giving feedback, but also in helping others give feedback. Refer again to your insistence in the previous session on following those guidelines.

Display Flipchart C: Helping Others Give Feedback, which should be based on Handout 5-1B: Helping Others Give Feedback. Explain these guidelines, using examples for each one.

Distribute Handouts 5-1A and 5-1B. Ask them to read them briefly, and encourage them to ask clarifying questions. Try to avoid a lengthy discussion of the relative merits of one or the other point, or of how appropriate the guidelines may be in various cultures. Tell them they will have an opportunity to discuss these points later. First, you want to give them a chance to practice using the guidelines, in that experiential training means learning as much as possible from active experiences, rather than from abstract theoretical discussions.

3. Procedure for Practicing Feedback Skills

Time: 10 minutes

Divide participants into groups of three. Explain the following procedures from Flipchart D: Feedback Practice Task Instructions, Part 1, and indicate that there will be two feedback practice rounds.

Round One

- Each person in the trio will play a different role:

  Role 1: Ahmed, the extension agent
  Role 2: Mohamed, Ahmed's supervisor
  Role 3: Observer

- Ahmed and Mohamed will each be given a separate situation sheet. The observer will be given both sheets.

- Take three to five minutes to prepare your role:

  — Mohamed, feedback giver
  — Ahmed, feedback receiver
  — Observer, looking at how Mohamed and Ahmed follow feedback guidelines

- Take five to seven minutes for the feedback session.

- Take seven to nine minutes for observer to share impressions with Ahmed and Mohamed.

Explain that you will describe Round Two after they have finished Round One. Distribute Handouts 5-2A and 5-2B: Feedback Situation 1 to the players and observers. Make sure the right people are given the situation for Ahmed and for Mohamed, and that the observer is given both situations.

4. Practice Feedback Skills — Time: 40 minutes

Begin Round One. This round should take no longer than 20 minutes. At the end of Round One, ask for quick answers to questions about how many used the criteria, what trouble they had, what they found most useful, and whether the observer used the guidelines when giving feedback to the players.

Then begin Round Two by displaying and explaining Flipchart D: Feedback Practice Task Instructions, Part 2:

Round Two

- New situation: Mohamed and his boss, the Division Director.

- The former Ahmed is now the observer. The previous observer is now the Division Director. Mohamed remains the same.

- Mohamed and the Division Director will each be given a separate situation sheet. The observer will be given both sheets.

- Take three to five minutes to prepare your role:

  — Division Director, feedback giver
  — Mohamed, feedback receiver
  — Observer, looking at how the Division Director and Mohamed follow feedback guidelines

- Take five to seven minutes for the feedback session

- Take seven to nine minutes for observer to share impressions with the Division Director and Mohamed

Distribute Handouts 5-2C and 5-2D: Feedback Situation 2. Stop the discussion after about 20 minutes and move to the next step.

5. Review Skill Practice — Time: 10 minutes

Ask what they think about the exercise:

- What was easy and what was difficult?

- Which criteria are easiest and which are most difficult to use?

- Which items did they choose to give feedback on? (Explain that they should choose only one or two items that are appropriate given the guidelines for giving feedback.)

Ask them what are some cultural considerations about feedback in their country and how the guidelines might be adapted to them.

6. Conclusions — Time: 10 minutes

Ask what they learned about giving and helping others give feedback. If possible record their answers on two flipcharts, one for giving and the other for helping others give feedback.

7. Wrap Up/Journal

Time: 10 minutes

Ask for some examples of how they plan to use feedback in their work situations. Focus both on opportunities and on possible barriers. Then talk briefly about how they will have many more opportunities to practice feedback during this workshop and encourage them to think of these guidelines at all times in the next few days.

Summarize the major points of this session and review the session objectives. Distribute Handout 5-3: Journal and give them time to complete it.

MATERIALS

Handout 5-1A: Guidelines for Giving Feedback
Handout 5-1B: Helping Others Give Feedback
Handout 5-2A: Feedback Situation 1: Ahmed
Handout 5-2B: Feedback Situation 1: Mohamed
Handout 5-2C: Feedback Situation 2: The Division Director
Handout 5-2D: Feedback Situation 2: Mohamed
Handout 5-3: Journal

Flipchart A: Session 5 Objectives
Flipchart B: Giving Feedback
Flipchart C: Helping Others Give Feedback
Flipchart D: Feedback Practice Task Instructions, Parts 1 and 2

GUIDE TO SESSION 6: CASE STUDY CLINIC

Total Time: 3.5 hours

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Discussion and Presentation	10 minutes		A. Session 6 Objectives
2. Case Study Demonstration	Presentation	40 minutes	Handout 6-1: Demonstration Case Study	B. Case Study Objectives C. Case Study Task Instructions
3. Characteristics of a Good Case Study	Task in Pairs and Large Group Discussion	25 minutes	Handout 6-2: Case Study: The Interrelationship between Water and Health	D. Task in Pairs
4. Learning Purpose for Case Studies	Large Group Brainstorming	10 minutes	Handout 6-3: Purpose and Characteristics of a Case Study	
5. Delivery Plan for a Case Study	Presentation	15 minutes	Handout 6-4: Delivery Plan for a Case Study	
6. Preparation for Case Study Delivery	Task in Pairs	35 minutes	Handout 6-5: Case Study—Latrine Hygiene in Kabora	E. Practice Preparation Task Instructions
7. Delivery and Critique	Practice	60 minutes		
8. Conclusions	Discussion	10 minutes		
9. Wrap Up/Journal	Discussion and Presentation/ Individual Task	5 minutes	Handout 6-6: Journal	

SESSION 6

CASE STUDY CLINIC

Total Time: 3.5 hours

OBJECTIVES

By the end of the session the participants will be able to

- Identify the characteristics of a good case study
- Describe when to use case studies and for what purpose
- Prepare a delivery plan for a case study

OVERVIEW

Experiential training is based on a variety of learning experiences. These learning experiences all have different objectives, but the overall purpose is the same: enabling learners to draw on their work and life experiences to acquire new knowledge and practice new skills. This session introduces participants to the case study as an experiential learning technique.

A case study is a narrative account of a series of events or situations that revolve around a specific problem or problems. Case studies can address a wide variety of problems: relationships between people, unclear roles between people who work together, inadequacies of bureaucratic systems, and so on.

This session focuses on building skills for the delivery of case studies. It begins with a demonstration of a model case study. This demonstration is used to analyze the characteristics of a good case study, its learning purpose, and a case study delivery plan. Participants then prepare to deliver a case study using another model case study. When their preparation is completed, the participants are divided into two groups and two volunteers practice delivering a case study.

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PROCEDURES

1. Introduction — Time: 10 minutes

Ask participants what a case study is from their viewpoint and experience and whether they have used them before in their training, either as trainers or as participants.

Present Flipchart A: Session 6 Objectives and present an overview of the session in your own words.

2. Case Study Demonstration — Time: 40 minutes

Explain that you will demonstrate the delivery of a case study. You want participants to be themselves in this demonstration. In addition, you want them to observe how you deliver the case study and to reflect on how the case itself is written. Once the demonstration is over, you will ask them for their observations and reflections. Finally, explain that you will stop at the processing step in the experiential learning cycle so that they can focus on all the steps used for case study delivery. The generalizing and applying steps will be covered in Session 7.

Base your demonstration on Handout 6-1: Demonstration Case Study. Use the following steps as a guide in your presentation.

A. Introduction (5 minutes)

Ask participants what training techniques they have seen used in schools and training institutions, and whether the trainers and teachers they have known would be open to trying different techniques.

Draw on their examples of traditional techniques and inflexible instructors and explain that you want to spend some time discussing how to convince people to try new approaches.

Display Flipchart B: Case Study Objectives and read it out loud.

B. Case Study (20 minutes)

Introduce the case study in your own words, then distribute Handout 6-1: Demonstration Case Study. Give them five minutes to read it and think about their responses to the discussion questions. Then present Flipchart C: Case Study Task Instructions, which should include the following information:

- Divide into groups of four or five people

- Discuss your answers to the three questions

- Agree on the most effective approach to preventing or solving the problem

- Take 15 minutes for this task

C. Processing (10 minutes)

- Ask one group to briefly describe the problem

- Ask the others if they agree

- Ask another group what they would do as the manager of this office

- Ask the other groups if they have different ideas

- Compare and contrast the different proposed approaches

- Ask another group to suggest how to avoid this problem, and turn to other groups for different suggestions

- Compare and contrast briefly

- Ask them what they thought of the case, and whether it seemed realistic

Thank them for their participation and say that the demonstration is over.

3. Characteristics of a Good Case Study   Time: 25 minutes

Present the task on Flipchart D: Task in Pairs as follows:

- Turn to your neighbor

- Look at the case studies on Handout 6-1 and Handout 6-2: The Interrelationship between Water and Health

- List what you think are two or three characteristics of a well-written case study

- Take 15 minutes for this task

Distribute Handout 6-2.

After 15 minutes, ask participants to share the characteristics they identified and record them on a flipchart. Make sure answers similar to the following are included:

- Situation is clearly stated
- Short and to the point
- Not too many details
- Complicated enough so that the solution is not obvious
- Realistic and believable
- Solvable
- Clearly written
- Capable of generating discussion

4. Learning Purpose for Case Studies Time: 10 minutes

Ask the total group to suggest the purposes for which a trainer would use a case study. Write their responses on a flipchart. Make sure to include answers similar to the following:

- Practice developing alternative strategies
- Portray field experience in the classroom
- Practice decision making
- Practice problem identification
- Practice problem solving

Ask what the difference is between a case study and a small group task. Accept answers that identify the small group task included in the case study. However, explain the distinction between a small group task, such as in Session 4, which is a one-dimensional exercise aimed at working through a problem, and a case study, which is a multidimensional hypothetical situation that involves opposing viewpoints or perspectives and is aimed at the learning purposes listed on the flipchart.

Distribute Handout 6-3: Purpose and Characteristics of a Case Study.

5. Delivery Plan for a Case Study — Time: 15 minutes

Conduct a brief presentation on how to deliver a case study. Ask participants to recall the major steps in the delivery of the demonstration case study in Step 2, the Case Study Demonstration. Write the steps on a flipchart and explain what was happening at each step and why.

Distribute Handout 6-4: Delivery Plan for a Case Study. Ask participants to read it. Then, encourage them to ask questions and briefly explain the steps described in Handout 6-4, especially if the wording is a bit different from what you wrote on the flipchart.

6. Preparation for Case Study Delivery — Time: 35 minutes

Display Flipchart E: Practice Preparation Task Instructions and explain the instructions that follow:

Task in Pairs

- Read Handout 6-5: Case Study—Latrine Hygiene in Kabora and/or Handout 6-2: Case Study: The Interrelationship between Water and Health
- Write a 35 to 40 minute delivery plan for setting up and processing this case study (use Handout 6-4 as a guide)
- Be sure to include
  - How to introduce the case
  - When to distribute the case
  - Task instructions, including how to group people and how much time to spend in groups

- Specific processing questions
- The amount of time allotted to each delivery step

• Take 30 minutes for this task

Explain that you will later ask for two people to delivery their plans in a practice session. Give them the option of delivering their plans alone or as a two-person team of co-trainers.

Distribute Handout 6-5: Case Study—Latrine Hygiene in Kabora and/or Handout 6-2: Case Study: The Interrelationship between Water and Health.

As you walk around to help the groups of two, try to identify the two delivery plans that seem the most solid. Encourage the people who prepared those plans to volunteer for delivering them. If they seem to be ready before the other groups, you may ask them to begin actual preparations by writing the case study objective and the task instructions on a flipchart. This early preparation will save time, and should be seriously considered if the session is running behind time.

7. Delivery and Critique

Time: 60 minutes

Divide the large group into two groups that are appropriate for the number of participants and trainers. Choose one participant (or a team of two) who will deliver the case.

Keep the case study delivery to a maximum of 40 minutes, stopping the presenter if necessary. Before the practice session begins, be sure to explain that you will stop at 40 minutes, and that the presenter(s) should not feel bad about it, because the main purpose of the session is to practice and learn, not to achieve immediate perfection.

Lead a critique of the delivery plan using questions modeled on the following:

- What was __________'s delivery plan?
- What was the climate-setting question?
- How did he/she group people? Appropriate?
- What instructions did she/he give? Appropriate?
- What was his/her processing plan?
- What was the opening question? Was it an open-ended question?

- How did she/he focus or guide the processing (use of paraphrasing, summarizing)?
- What worked?
- What could have been improved?

Keep the critique to a maximum of 20 to 25 minutes.

8. Conclusions Time: 10 minutes

Ask participants what they learned about case studies and more specifically about writing a delivery plan and having to deliver it. Write their answers on a flipchart.

9. Wrap Up/Journal Time: 5 minutes

Ask in what situations they would consider using case studies. Suggest that they write these ideas down using Handout 6-6: Journal.

Remind participants to hold onto their work because they may want to use it in the practice training session later in the week.

Review the session objectives.

MATERIALS

Handout 6-1: Demonstration Case Study
Handout 6-2: Case Study: The Interrelationship between Water and Health
Handout 6-3: Purpose and Characteristics of a Case Study
Handout 6-4: Delivery Plan for a Case Study
Handout 6-5: Case Study—Latrine Hygiene in Kabora
Handout 6-6: Journal

Flipchart A: Session 6 Objectives
Flipchart B: Case Study Objectives
Flipchart C: Case Study Task Instructions
Flipchart D: Task in Pairs
Flipchart E: Practice Preparation Task Instructions

GUIDE TO SESSION 7: SESSION DESIGN FRAMEWORK

Total Time: 1.5 hours

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Discussion and Presentation	10 minutes		A. Session 7 Objectives
2. Generalizing and Applying	Lecturette	20 minutes		B. Writing Generalizing and Applying Questions C. The Experiential Learning Cycle
3. Writing Generalizing and Applying Questions	Small Group Task	30 minutes		D. Small Group Task
4. The Seven Step Model	Discussion	15 minutes	Handout 7-1: Design Components of an Experiential Training Session	E. The Seven Step Model
5. Conclusions	Discussion	10 minutes		
6. Wrap Up/Journal	Discussion/Individual Task	5 minutes	Handout 7-2: Journal	

SESSION 7

SESSION DESIGN FRAMEWORK

Total Time: 1.5 hours

OBJECTIVES

By the end of the session the participants will be able to

- Identify the reasons for generalizing and applying
- Write generalizing and applying questions
- List the seven steps of a training design

OVERVIEW

The purpose of this session is to learn how the components of the experiential learning cycle (ELC) are used in a session design model. Participants were introduced to the ELC in Session 2, when they analyzed how the ELC steps were used to deliver a case study. This session both reinforces that session and presents a model that translates the theoretical framework of the ELC into seven simple steps. In the Small Group Task and Case Study Clinics (Sessions 4 and 6), participants worked on four of those seven steps, from climate setting through processing. This session focuses on the generalizing and applying steps as well as the wrap up step.

The session begins with a presentation on the generalizing and applying steps. Participants then practice writing generalizing and applying questions using the three case studies presented up to this point in the workshop. The session ends with a presentation and a discussion on the seven steps in a session design.

PROCEDURES

1. Introduction

Time: 10 minutes

Refer to the previous session. Ask participants for some examples of questions you asked when critiquing the practice session. Tell them those are examples of processing questions. Ask them for other examples of processing questions. They should give examples of the questions they prepared to process their case study or small group task, among others.

Previou

Explain that you want to go beyond the processing step in this session, and that the reason for stopping at that step up to this point in the workshop was so they could first master all the steps that lead to and include processing.

Present the session overview in your own words and introduce the objectives on Flipchart A: Session 7 Objectives.

2. Generalizing and Applying

Time: 20 minutes

Refer to the previous session and ask for examples of the questions you asked in "Step 8: Conclusions" and "Step 9: Wrap Up." List them in two separate columns on Flipchart B: Writing Generalizing and Applying Questions.

Ask what is the purpose of generalizing and how it relates to the other stages in the ELC. Display Flipchart C: The Experiential Learning Cycle (the same as Flipchart H from Session 2) as a reference point. Encourage answers such as the following:

- Relating the patterns that evolved during the experience phase to the experiences of everyday life
- Drawing conclusions that help derive general meaning from the experience
- Identifying key learning points that are of general significance
- Making generalizations that relate to the session objective

Point out that it is important not to confuse the processing and generalizing steps. The processing step still refers to events that occurred during the experience. Discussion of specific events in the experience should end before beginning the generalizing step. Otherwise, participants will still be thinking of the experience, and not what they learned that will be useful to them in their work or at home.

Ask for additional examples of generalizing questions and add them to the flipchart. Include examples that are similar to the following:

- What did you learn from this experience?
- What more general meaning does this have for you?
- What conclusions might we draw from that?

- What are the most important things you have learned from this session?

- What does that suggest to you about _______ in general?

Next, ask what is the purpose of applying and how it relates to the other stages in the ELC. Encourage answers such as the following:

- Drawing on insights from the generalizing step to identify how to use them in everyday life

- Planning for more effective post-workshop behavior

- Planning for using new skills in everyday life

Ask for additional examples of applying questions and add them to the flipchart. Include examples that are similar to the following:

- How would you apply/transfer that?

- What would help/hinder the application of this concept?

- How might you overcome the problems that hinder its application?

- What modifications would make it work for you?

- What would you like to do with _______ in your back-home situation?

- What are the options open to you?

3. Writing Generalizing and Applying Questions Time: 30 minutes

Explain that you want to give them some practice in writing generalizing and applying questions. Display Flipchart D: Small Group Task, as follows:

- Divide into groups of three or four people

- Choose one of the three case studies used in this workshop (Handouts 2-4, 6-1, or 6-3)

- Write two generalizing and two applying questions for the case study

- Take 15 minutes for this task

When the 15 minutes are over, ask each group to share examples of generalizing questions they wrote. Discuss and critique as appropriate. Then move to the applying questions.

Remind them to hold onto the work they have done because they may need it for the sessions of practice training in Week Two of the workshop.

4. The Seven Step Model — Time: 15 minutes

Make a presentation on the design model using Flipchart E: The Seven Step Model. Flipchart E is based on the steps outlined in Handout 7-1: Design Components of an Experiential Training Session.

Participants should remember these steps: (1) climate setting, (2) the objectives, (3) the experience, (4) processing, (5) generalizing, and (6) applying. Ask them what they think the seventh step is, then unveil the "closure" step and explain it as it is stated in Handout 7-1. Indicate that it could also be called "wrap up," as it is called in this guide (in this guide, the applying and closure steps are combined in the "wrap up" step).

Explain that the generalizing and applying steps do not always immediately follow the processing of an experience. They usually come at the end of an entire session that may include several experiences, such as role plays and case studies, that trainers have presented and processed.

Distribute Handout 7-1.

5. Conclusions — Time: 10 minutes

Ask what are the most important things they have learned in this session.

6. Wrap Up/Journal — Time: 5 minutes

Ask participants to write in their journal, Handout 7-2.

Summarize the main learning points in this session and review the session objective.

MATERIALS

Handout 7-1: Design Components of an Experiential Training Session
Handout 7-2: Journal

Flipchart A: Session 7 Objectives
Flipchart B: Writing Generalizing and Applying Questions
Flipchart C: The Experiential Learning Cycle
Flipchart D: Small Group Task
Flipchart E: The Seven Step Model

GUIDE TO SESSION 8: LECTURETTES AND DEMONSTRATIONS PREPARATION FOR PRACTICE

Total Time: 3.5 hours

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Presentation and Discussion	10 minutes		A. Session 8 Objectives
2. Characteristics and Learning Purposes of Lecturettes	Large Group Discussion	10 minutes		
3. Delivering Lecturettes and Demonstrations	Presentation	40 minutes	Handout 8-1A: The Interactive Lecturette Handout 8-1B: Using Visual Aids	B. Delivering Lecturettes
4. Preparation for Practice	Task in Pairs	2.5 hours	Handout 8-2A, B, and C: Sample Lecturette Outlines Handout 8-3: Preparing and Presenting a Demonstration Handout 8-4: Sample Demonstration Handout 8-5: Session Preparation Task	C. Preparing a Demonstration D. Presenting a Demonstration E. Practice Preparation Task instructions

SESSION 8

LECTURETTES AND DEMONSTRATIONS—PREPARATION FOR PRACTICE

Total Time: 3.5 hours

OBJECTIVES

By the end of the session the participants will be able to

- Identify the characteristics and learning purposes of interactive lecturettes
- Deliver an interactive lecturette
- List the steps for making a demonstration more experiential

OVERVIEW

Traditional teaching methodology often relies on the lecture for transferring information from instructor to student. However, part of the philosophy of adult learning is that the learning environment can be greatly enriched by the active participation of the learners. When they are actively involved in the learning process, participants are more likely to assume responsibility for their own learning. Interactive lecturettes and demonstrations are designed to involve participants through discussion and activities that are conducive to the effective transfer of information. They are among the more frequently used techniques for transferring knowledge in training programs. It is therefore critical for trainers to understand the concepts and processes involved in delivering interactive lecturettes and demonstrations.

This session begins by identifying the characteristics of a good lecturette, its learning purpose, and its major stages. A brief presentation on preparing and conducting a demonstration follows. Then, participants choose from among several sample lecturettes and outline how they plan to deliver it. The sample lecturettes lead either to a small group task or a case study, which participants will have prepared in Sessions 4 and 6. After preparing their lecturette, participants prepare an entire 45-minute session for the first round of practice training, which follows this session.

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PROCEDURES

1. Introduction — Time: 10 minutes

Ask participants how many use lectures in their training activities. Find out whether they find that approach easy or difficult, and what they see as the advantages and disadvantages. Ask the same questions about demonstrations. State that this session will deal with both techniques.

Present the session overview in your own words and introduce the objectives on Flipchart A: Session 8 Objectives.

2. Characteristics/Learning Purposes of Lecturettes — Time: 10 minutes

Give a definition of an interactive lecturette. On a flipchart, write a definition that resembles the following:

> An interactive lecturette is a brief presentation that involves learners through questions and visual aids.

Explain that it is a stimulating and powerful mode for helping individuals integrate personal learning with conceptual materials.

Ask what participants think are the characteristics of a good lecturette. Write their responses on the flipchart and encourage answers such as the following:

- Is short (10-25 minutes)
- Uses open-ended questions to involve participants
- Makes a few key points
- Draws on the experience of participants
- Uses visual aids (flipchart, handouts, etc.)
- Is carefully prepared

Ask what are some learning purposes of lecturettes. Write responses on the flipchart and encourage answers such as the following:

- Transferring knowledge
- Exploring principles, models, research findings, or theory

Explain that lecturettes are usually one of two or more techniques used in a session. They may precede or follow a case study, exercise, or role play. Lecturettes are therefore a knowledge building block in a session that may involve the practice of skills through another technique.

3. Delivering Lecturettes and Demonstrations — Time: 40 minutes

A. Describe the three stages for preparing and presenting a lecturette on Flipchart B: Delivering Lecturettes, as follows:

- Introductory questions
- Main (key) points
- Summary

Explain the three stages and provide tips for presenting effective lecturettes. Involve participants in this lecturette through questions in order to model the technique effectively and consistently. Use Handouts 8-1A: The Interactive Lecturette and 8-1B: Using Visual Aids.

Distribute Handouts 8-1A and 8-1B. Then, distribute and describe Handouts 8-2A, B, and C: Sample Lecturette Outlines. Show how they are linked to the previously covered case studies and small group tasks.

B. Make a brief presentation on how to make demonstrations interactive. Ask participants what would be similar to or different from between the approach used to make lecturettes interactive. Confirm that the approaches are very similar, but that there are some additional steps that will make demonstrations effective.

Use Handout 8-3: Preparing and Presenting a Demonstration as a guide in your presentation. Put the key points on Flipchart C: Preparing a Demonstration and on Flipchart D: Presenting a Demonstration.

Distribute Handout 8-3. Then, distribute Handout 8-4: Sample Demonstration. Explain that this sample provides an example of a hygiene education demonstration.

4. Preparation for Practice

Time: 2.5 hours

Give the task on Flipchart E: Practice Preparation Task Instructions, as follows:

Task in Pairs

- Select one of the lecturettes from Handouts 8-2A, B, C that you would like to present
- Prepare an interactive lecturette lasting no more than 15 minutes
- Write an objective
- Write the questions you plan to ask and describe how you plan to present the key points
- Estimate how much time each question and key point will take
- Write your objective and key points on a flipchart
- Take 35 minutes for this task

Walk around and monitor their progress, offering help where needed.

Explain that you now want each pair to develop an entire 45 minute session that includes both the lecturette and either a small group task or a case study, depending on the subject they have chosen. Say that they will deliver the design in the next session.

Distribute Handout 8-5: Session Preparation Task and write the main points on Flipchart E: Practice Preparation Task Instructions.

Make sure they are clear about the need for a written training plan and that all their visual aids should be ready by the end of this session. If photocopying is needed, make arrangements in advance of the session so that participants will not be delayed. Provide them with flipchart paper and markers as needed.

Circulate among the groups, helping them with their training plans as much as possible without being too prescriptive.

Explain how you have assigned the presentation times. Show a block calendar with the names in each block of time. Allow 45 minutes for each presentation and 30 minute for feedback from the trainer(s).

You should divide participants into two groups, or tracks, during part or all of the practice training sessions, one with each trainer. This arrangement will allow each participant an opportunity to be involved in an entire presentation.

MATERIALS

Handout 8-1A: The Interactive Lecturette
Handout 8-1B: Using Visual Aids
Handouts 8-2A, B, C: Sample Lecturette Outlines
Handout 8-3: Preparing and Presenting a Demonstration
Handout 8-4: Sample Demonstration
Handout 8-5: Session Preparation Task

Flipchart A: Session 8 Objectives
Flipchart B: Delivering Lecturettes
Flipchart C: Preparing a Demonstration
Flipchart D: Presenting a Demonstration
Flipchart E: Practice Preparation Task Instructions

GUIDE TO SESSION 9: PRACTICE TRAINING ROUND ONE

Total Time: 7 hours, 45 minutes

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Practice Training	Practice in Pairs	7 hours		
2. Discussion	Discussion	30 minutes	Handout 9-1: Observer's Checklist	
3. Wrap Up/Journal	Discussion/Individual Task	15 minutes	Handout 9-2: Journal	

SESSION 9

PRACTICE TRAINING ROUND ONE

Time: 7 hours, 45 minutes

OBJECTIVES

By the end of the session participants will be able to

- Deliver a session using the seven steps in the design framework
- Work with a co-trainer
- Identify those areas in which they need to improve their skills

OVERVIEW

Practice training is the key component of a training of trainers workshop. It gives participants a chance to improve on existing training knowledge and skills and try out new skills in a situation in which more experienced trainers can give them feedback.

This session is divided into five modules, each lasting 75 minutes—45 minutes for a session presentation by a team of two participants, and 30 minutes for feedback. If the workshop has 20 participants who are divided into two tracks, there will be five practice sessions in each track. If there are more than 20 participants, there will be a time problem. The trainers can use Handout 9-1: Observer's Checklist as a guide for giving feedback to participants. This checklist may be handed to participants after the practice training is over. However, it should not be used as part of a formal job performance review.

The use of a videotape machine can greatly enhance the feedback sessions. When using a videotape, the trainer notes both highlights of the session and some portions needing improvement by keeping track of the counter on the machine. After giving some verbal feedback, the trainer briefly runs the tape to show the portions of the session he or she has selected for review.

The verbal feedback session usually begins with the trainer asking the participants who were not delivering the session what went well and what could be improved, then asking the practice trainers what they learned. Encourage them to write down what they learned. Then show excerpts from the videotape, if one is available.

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The trainers should take at least 30 to 45 minutes at the end of all the practice sessions to discuss what participants learned and where they want to make improvements and to give them time to write some reflections in their journals.

PROCEDURES

1. Practice Training

Time: 7 hours

Use the information in the Overview to remind the group of practice training. Allow a few minutes for the first group to set up and begin Round One. Work through all five rounds, allowing 45 minutes for the practice session and 30 minutes for feedback. Keep to the schedule so you don't run into trouble at the end of the day.

2. Discussion

Time: 30 minutes

Ask the participants the following questions:

- What did you learn about delivering training?
- What did you find difficult?
- What would you like to improve during the second round?

Make any general comments based on the practice training sessions, highlighting those things that went well.

Distribute Handout 9-1: Observer's Checklist.

3. Wrap Up/Journal

Time: 15 minutes

Allow time for participants to write in their journals. Distribute Handout 9-2: Journal.

MATERIALS

Handout 9-1: Observer's Checklist
Handout 9-2: Journal

GUIDE TO SESSION 10: FIELD EXERCISES

Total Time: 2 hours, 10 minutes

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Presentation and Discussion	10 minutes		A. Session 10 Objectives
2. Characteristics of a Well-planned Field Exercise	Discussion	15 minutes		
3. Learning Purpose for Field Exercises	Discussion	15 minutes		
4. Steps in Planning and Carrying out a Field Exercise	Small Group Task	70 minutes		B. Small Group Task Instructions
5. Conclusions	Discussion	10 minutes		
6. Wrap Up/Journal	Discussion/Presentation/ Individual Task	10 minutes	Handout 10-1: Journal	

SESSION 10

FIELD EXERCISES

Total Time: 2 hours, 10 minutes

OBJECTIVES

By the end of the session the participants will be able to

- Identify the characteristics and learning purpose of a field exercise
- Describe the steps needed to plan and carry out a field exercise

OVERVIEW

Experiential training is based on a variety of learning experiences. The learning experiences all have different objectives, but the overall purpose is the same: enabling learners to draw on their work and life experiences to acquire new knowledge and develop new skills. This session introduces participants to the field exercise, one of the richest experiential training techniques if properly conceived and conducted. However, it is probably the most difficult technique to use effectively due to the large number of variables, both human and technical, on which it depends. Therefore, a field exercise requires careful and thoughtful preparation by the trainer in order to make sure that it will be a meaningful training experience for the participant. In addition, it should be a pleasant and useful experience for the community members who are involved in the field experience.

In this session participants analyze the characteristics of a good field exercise and its learning purpose. They then work in groups to identify the considerations to take into account when planning and carrying out a field exercise.

PROCEDURES

1. Introduction

Time: 10 minutes

Ask participants what experiences they have had as either trainers or trainees with field trips. What kinds of problems did they encounter? What did they like or not like?

Describe the session overview in your own words and introduce the objective using <u>Flipchart A: Session 10 Objectives</u>.

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2. Characteristics of a Well-planned Field Exercise   Time: 15 minutes

Ask them to take a couple of minutes to list individually what they think are two or three characteristics of a good field exercise. Then ask them to share the characteristics they identified and write them on a flipchart. Make sure answers similar to the following are included:

- Clear objectives
- Tasks clearly delineated
- Set tasks with realistic times
- Follow the seven-step design model
- Needs and expectations of community members taken into account
- Community members contacted well in advance
- Doublechecking with community members just before the field exercise
- Field exercise purpose explained clearly to community members and agreements reached on norms
- Logistical arrangements made carefully
- Contingency plans made for logistical problems
- Briefing and debriefing of participants carefully thought out

3. Learning Purpose for Field Exercises   Time: 15 minutes

Ask the total group to make suggestions on the purposes for which a trainer would use a field exercise. Write responses on a flipchart. Make sure to include answers similar to the following:

- Practice technical skills (well, latrine construction, etc.)
- Practice communication skills

- Practice data collection skills
- Simulate actual field experience in a training context
- Practice problem identification
- Practice problem solving

4. Steps in Planning and Carrying out a Field Exercise Time: 70 minutes

Present the following task on Flipchart B: Small Group Task Instructions:

- Divide into groups of five or six people
- List the two or three most important considerations trainers should take into account when
  - Preparing the community for the field exercise
  - Organizing logistics
  - Introducing the session to participants
  - Managing the exercise when participants are in the community
  - Debriefing participants
  - Debriefing community members
- Be prepared to report out
- Take 30 minutes for this task

In order to save time, assign one or more sets of considerations per group. For example, if there are three groups, Group 1 would analyze "a" and "b," Group 2 "c" and "d," etc.

Manage the reporting out in the large group so that each group makes a brief report of no more than five minutes, focusing on the two or three most important considerations. Lead a discussion of no more than 10 minutes after all groups have completed their presentations.

5. Conclusions Time: 10 minutes

Ask participants what are the most important things to remember when planning, carrying out, and closing a field exercise. Write their answers on a flipchart.

6. Wrap Up/Journal

Time: 10 minutes

Ask participants what they plan to do when they organize field exercises back at work.

Summarize the main learning points of the session and review the session objectives.

Distribute Handout 10-1: Journal and give participants time to complete it.

MATERIALS

Handout 10-1: Journal

Flipchart A: Session 10 Objectives
Flipchart B: Small Group Task Instructions

GUIDE TO SESSION 11: WEEK ONE EVALUATION

Total Time: 30 minutes

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Discussion	10 minutes		A. Session 11 Objective B. Success Analysis Questions
2. Week One Evaluation	Discussion	20 minutes		C. Overall Workshop Goals

SESSION 11

WEEK ONE EVALUATION

Total Time: 30 minutes

OBJECTIVE

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

- Use success analysis to evaluate the first week of the workshop

OVERVIEW

Success analysis has proven to be an extremely useful tool in helping participants evaluate training programs. It has also been used as a tool to help communities evaluate their participation in the development of local health projects.

Trainers reintroduce the concept of success analysis (refer to Session 4) and ask the participants to use success analysis questions to evaluate the first week of the workshop.

PROCEDURES

1. Introduction

Time: 10 minutes

Introduce the session by stating the importance of taking some time at the end of each week of a workshop to assess how well it is progressing, how well the overall goals are being met, and how the participants feel about the work they are doing. If anything needs to be altered or improved, trainers can make the appropriate changes in the second week of the workshop.

Present the overview of the session in your own words with the aid of Flipchart A: Session 11 Objective.

Present Flipchart B: Success Analysis Questions:

- What did we do that was successful? Why?

- What problems did we encounter? How did we overcome them?

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- What problems remain to be resolved? How can we solve them?

Explain that the first question asks about success, not only to start off on a positive note, but also because people can learn as much from their successes as they can from their failures. The second question focuses on problems that arose that were resolved positively. It helps people understand how they are able to overcome obstacles and solve problems. The final question identifies the remaining problems and helps participants propose ways to resolve them. Ask if there are any questions about success analysis.

2. Week One Evaluation

Time: 20 minutes

Refer to Flipchart C: Overall Workshop Goals and point out those goals that were addressed during the first week of the workshop. Write each of the following questions at the top of the flipchart:

- What has contributed to our success in accomplishing these goals?
- What has contributed to our problems in accomplishing these goals?
- How can we improve the workshop so that it will be more effective in accomplishing its overall goals?

Ask participants to respond to each question and write their responses on the flipchart. Then review their answers as follows:

- Point out how much of the success was due to what participants did in the workshop. Explain how important it is to have such active participation in order for experiential training to be successful.
- Clarify any problems that seem unclear. Point to those that have been or are being resolved. Validate other problems that you have noticed.
- Review the final list and see if the suggestions respond to the problems. Are they realistic? Can the workshop be adapted in that manner? Explain which recommendations you feel can be implemented in the next week and which cannot. Suggest other alternatives for responding to the problems.

MATERIALS

Flipchart A: Session 11 Objective
Flipchart B: Success Analysis Questions
Flipchart C: Overall Workshop Goals

GUIDE TO SESSION 12: ROLE PLAYS

Total Time: 2 hours, 15 minutes

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Presentation and Discussion	10 minutes		A. Session 12 Objectives
2. Role Play Demonstration	Presentation	40 minutes		B. Role Play Objective C. Role Play Task Instructions
3. Characteristics of a Good Role Play	Task in Pairs and Large Group Discussion	25 minutes	Handout 12-1: Demonstration Role Play Handouts 3-1A and 3-1B: Role Play Sheets Handouts 5-2A and 5-2B: Feedback Situation 1	
4. Learning Purposes for Role Plays	Large Group Brainstorming	10 minutes		
5. Delivery Plan for a Role Play	Presentation	30 minutes	Handout 12-2: Delivery Plan for a Role Play	
6. Conclusions	Discussion	10 minutes		
7. Wrap Up/Journal	Discussion and Presentation/ Individual Task	10 minutes	Handout 12-3: Role Plays—Core Material Handout 12-4: Journal	

SESSION 12

ROLE PLAY CLINIC

Total Time: 2 hours, 15 minutes

OBJECTIVES

By the end of the session the participants will be able to

- Identify the characteristics of a good role play
- Describe when to use role plays and for what purpose

OVERVIEW

Role playing is a versatile and basic training technique. It has wide utility for training in communication skills, improvement of interpersonal relationships, and team development. Role playing is used to build skill at actually doing something, as well as to get people involved in lifelike situations in which there are problems or conflicts. Role plays can be simple (involving two characters) or more complex (involving several characters). The effective use of this technique in experiential training sessions requires that the user have a clear plan for its introduction, implementation, and processing.

The purpose of this session is to examine the technique of role playing, its benefits in training, and the processes involved in conducting role plays. The session begins with a demonstration of a role play, followed by an analysis of the role plays' characteristics and purpose and a lecturette on how to develop a delivery plan for a role play.

PROCEDURES

1. Introduction — Time: 10 minutes

Ask participants what kind of live theater they have experienced in their communities and what they liked about those performances. Make a distinction between the live dramas they describe and the role play format they will be working on in this session. Explain that role playing as it is used in this session is not scripted as is a theater piece, but it is based on a description of an open-ended situation, from which participants decide how to play the roles. Make sure this distinction is clear and ask if they have experienced this role playing format before.

Give an overview of the session in your own words and introduce the objectives on Flipchart A: Session 12 Objectives.

2. Role Play Demonstration

Time: 40 minutes

Explain that you will demonstrate the delivery of a role play. You want participants to be themselves in this demonstration. In addition, you want them to observe how you deliver the role play and to reflect on how it is written. Indicate that once the demonstration is over you will ask them for their observations and reflections. Finally, explain that you will stop at the processing step in the experiential learning cycle so that they can focus on all the steps used for role play delivery.

Base your demonstration on Handout 12-1: Demonstration Role Play. Use the following steps as a guide in your presentation.

A. Introduction (Time: 5 minutes)

Explain that you want to spend some time discussing how to convince people to try new training approaches. Ask them to give examples of the strategies they developed for convincing people to try the experiential training approach in Session 6 during the case study demonstration.

Display Flipchart B: Role Play Objective and read it out loud. The objective should read as follows:

At the end of the session, participants will be able to explain at least two advantages of the experiential approach.

B. Role Play (Time: 20-25 minutes)

1. Set up the situation

   Introduce the role play in your own words, carefully describing the respective roles of Muni and Abdi.

2. Ask for volunteers

   Ask for a volunteer willing to play the role of Muni, the director of the training center, and for another volunteer willing to play the role of Abdi, the trainer.

3. Brief the players

Take the two volunteers aside, outside the training room if possible. Give one player Handout 12-1A: Muni and the other Handout 12-1B: Abdi. Tell them to read their roles and that you will be available to answer any questions they might have. Ask them not to discuss their roles with each other.

4. Brief the observers

In the meantime, have the other trainer brief the rest of the participants, as follows on Flipchart C: Role Play Task Instructions:

- Be prepared to observe Muni's strategy for convincing Abdi to use the experiential training approach
- Remember to be descriptive about the things you have observed

5. Set the stage and begin

Set up two chairs at the front of the room at angles so that the players can see each other and so that the observers can see their faces. Tell participants that the setting is in Muni's office, and that Muni has asked Abdi to come and discuss experiential training methodology. Remind them who is playing Muni and who is playing Abdi. Ask the players to begin.

6. End the role play

Let the role play run for five minutes, or less if the players finish earlier. Thank the players and lead a round of applause. Ask them to stay in their seats for a few minutes while you ask some questions.

7. Process

Ask the observers:

- What was Muni's strategy?
- How was it working?
- What was Abdi's strategy?
- How was it working?

Ask the players:

- Muni, what was your strategy? How do you think it worked?

- Abdi, what was your strategy? How did it work?

Ask the players to retake their seats with the other participants, thanking them once again and applauding.

Ask all participants:

- What other strategies would you have used for Muni?

- What difficulties do you expect to encounter with these other strategies?

End the demonstration. Explain that you would normally continue with some generalizing and applying questions, but that you want them to focus on the delivering and processing of a role play.

3. Characteristics of a Good Role Play

Time: 25 minutes

Distribute the entire Handout 12-1: Demonstration Role Play. Ask participants to read them and to pull from their folders and reread Handouts 3-1A and 3-1B: Role Play Sheet and Handouts 5-2A and 5-2B: Feedback Situation.

Have them turn to their neighbors to discuss what they think are two or three characteristics of a good role play. Give them five minutes for their discussion.

Ask the entire group to share what they see as these characteristics and list them on a flipchart. Make sure most of the following are included:

- Actively involves people

- Short, to the point

- Well written

- Clear

- Has a point of contention

- Clear objective(s)
- Not a script
- Puts people into a situation
- The end should not be predetermined

4. Learning Purposes for Role Plays

Time: 10 minutes

Ask the entire group to identify what the learning purposes are for role plays. Encourage answers such as the following:

- Practice carrying out alternative strategies
- Play out field experience in the classroom
- Practice addressing interpersonal problems
- Practice decision making
- Practice problem solving
- Practice communication skills

5. Delivery Plan for a Role Play

Time: 30 minutes

Do a lecturette based on Handout 12-2: Delivery Plan for a Role Play. Ask participants to recall the steps in your delivery of the demonstration role play. Give examples of how and why you used those steps.

Distribute Handout 12-2: Delivery Plan for a Role Play.

6. Conclusions

Time: 10 minutes

Ask participants what they learned about role plays and more specifically about writing a delivery plan. Write their answers on a flipchart.

7. Wrap Up/Journal

Time: 10 minutes

Ask in what situations they might use role plays, what difficulties they might encounter, and how they might overcome such difficulties. Summarize the main learning points of the session and review the session objectives.

Distribute Handout 12-3: Role Plays—Core Material. Explain that the handout is intended to provide more information about role plays and to reinforce what was discussed during the session.

Ask them to write in their journals, Handout 12-4.

MATERIALS

Handout 12-1: Demonstration Role Play
Handout 3-1A: Extension Agent Role Play Sheet
Handout 3-1B: Committee President Role Play Sheet
Handout 5-2A: Feedback Situation 1: Ahmed
Handout 5-2B: Feedback Situation 2: Mohamed
Handout 12-2: Delivery Plan for a Role Play
Handout 12-3: Role Plays—Core Material
Handout 12-4: Journal

Flipchart A: Session 12 Objectives
Flipchart B: Role Play Objective
Flipchart C: Role Play Task Instructions

GUIDE TO SESSION 13: PLANNING AND MANAGING A TRAINING EVENT—ROLE OF THE TRAINER

Total Time: 2 hours, 45 minutes

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Presentation and Discussion	10 minutes		A. Session 13 Objectives
2. Role of the Trainer as Planner and Manager	Presentation	25 minutes	Handout 13-1: The Role of the Trainer	B. Role of the Trainer
3. Training Program Development	Presentation	20 minutes	Handout 13-2: The Four Stage Model	C. The Four Stage Model
4. Effective Training Consultancy	Small Group	60 minutes	Handout 13-3: How to be an Effective Consultant Handout 13-4: Characteristics of an Effective Training Team	D. Small Group Task
5. Topic Assignments/ Clarifying Team Roles	Small Group	40 minutes		E. Small Group Task
6. Wrap Up	Discussion	10 minutes		

SESSION 13

PLANNING AND MANAGING A TRAINING EVENT—ROLE OF THE TRAINER

Total Time: 2 hours, 45 minutes

OBJECTIVES

By the end of the session participants will be able to

- Explain functions trainers should perform
- List the four basic stages necessary for developing and managing a training program
- Identify the elements of an effective training consultancy
- Decide how to work effectively as a team

OVERVIEW

Trainers must perform several functions in order to plan and manage training programs effectively. They not only act as instructors and designers, but are frequently consultants and administrators. Trainers are consultants when they work with people in organizations to establish and evaluate program goals for train ; interventions that address performance problems. They are designers when they build on those goals to select and synthesize methods and media into an integrated program. Trainers are instructors when they deliver a learning design and provide ongoing feedback and evaluation to facilitate learning. They are administrators when they establish and monitor budgets, set up facilities, and monitor overall logistics to provide a positive learning environment.

The first portion of the workshop focused on the knowledge and skills trainers need to be effective instructors. The second portion of the workshop addresses the role of a trainer as consultant, designer, and administrator. Participants then learn about these roles through a module that covers planning and managing an entire training event in four stages: (1) Assessing Training Needs; (2) Training Program Development; (3) Organizing the Event; and (4) Evaluation of Training. This session on the role of the trainer provides an introduction to the module on planning and managing a training event.

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In this overall module, participants design three to four training events and discuss ways to implement and evaluate them in order to develop skills in consulting, designing, and administration. When they complete the module on planning and managing a training event, participants once again practice their skills as instructors by delivering sessions selected from the training events they will have designed.

This session begins with a presentation on the role of the trainer as a planner and manager. Participants then learn about the process of developing and managing a training program in the four basic stages. As trainers work through the four stages, they perform the functions of consultants, designers, administrators, and instructors.

This session provides an introduction to a simulation in which participants, working in teams, will practice these functions as they work through the four basic stages of developing and managing a training program. The members of each team play the role of trainers/consultants who are helping a client develop a design for a training event. The workshop trainers play the role of a client who wants these trainers/consultants to plan and manage a training program.

Before beginning their team work, participants are asked to identify what makes for an effective training consultancy in order to establish some norms that will help them work together better. The trainers then assign a topic to each group. Finally, participants begin their team work by deciding what their approach will be for working with their client.

PROCEDURES

1. Introduction

Time: 10 minutes

Ask participants:

- With whom do you work when you are planning a training event?
- What kinds of problems do you encounter in working with those people?
- What kinds of problems do you face when managing a training event?

Present the session overview and introduce the objectives on Flipchart A: Session 13 Objectives. Make sure to state that this session is an introduction to a four-part module on planning and managing a training event. Go over the four parts briefly.

2. Role of Trainer as Planner and Manager — Time: 25 minutes

Deliver a lecturette based on Handout 13-1: The Role of the Trainer. Explain the functions of a trainer first and write them on Flipchart B: Role of the Trainer in boxes modeled after those in Handout 13-1. Then fill in the boxes rapidly using questions linked to the titles of each box. For example, for the box entitled "administrator," ask questions such as, "What are some examples of administrative functions that trainers need to perform?" Add functions in each of the boxes. Distribute Handout 13-1.

3. Training Program Development — Time: 20 minutes

Using Flipchart C: The Four Stage Model, present the main points in Handout 13-2: The Four Stage Model, as follows.

- Assessing Training Needs
- Training Program Development
- Organizing the Event
- Evaluation of Training

Link each of the four stages above to the simulation in which the groups will participate in Sessions 14 through 17. Explain that they will do another round of practice training in Sessions 18 and 19, using some of the sessions from the training program they will design in the simulation. Distribute Handout 13-2.

4. Effective Training Consultancy — Time: 60 minutes

Divide participants into groups of five or six people. Try not to have more than four groups. Explain that the members of each small group will play the role of a team of trainers who are consultants to a client. The role of the client will be played by the trainers. Explain that in a few minutes each team will receive an assignment from their client. First, you want them to think of ways they can work effectively as a team of consultants. Give them the following task on Flipchart D: Small Group Task:

- List the two most important things you can do to be effective consultants

- Identify two things that will help you work together as an effective team

- Take 25 minutes for this task

When they have finished their task, ask them to report out and write their answers on a flipchart. Then distribute Handout 13-3: How to be an Effective Consultant and Handout 13-4: Characteristics of an Effective Training Team. Suggest that they add to the handouts their answers from the flipchart. Ask if there are any questions, and emphasize those points you think are particularly important.

5. Topic Assignments/Clarifying Team Roles Time: 40 minutes

Choose from among the following topics one or two that you want to assign to the teams: hygiene education; handpump installation and maintenance; latrine construction; spring capping; community participation.

Substitute other topics if they seem more appropriate. You may decide to give the same assignment to all teams, or to give two different assignments, one to two teams, and the other to the two other teams, depending on their background and interest in the topics. Do not assign more topics than there are trainers, because the eventual interviews will occur at one designated time. If there are four teams and two trainers (clients), then there should be no more than two topics. The two teams with the same topic will interview one trainer (client) together.

Ask participants to remain in their teams. Explain that in the next session they will meet with their client, who will help them define the needs of people who are to be trained. Then ask them to discuss their role as consultant team members, including the following task on Flipchart E: Small Group Task:

- Agree on your consultant approach to working with the client

- Clarify team roles and responsibilities—agree on a different team member to take the lead at each of the four stages of training program development

- Focus on how you will work together—don't begin work on the training program design

Give them 25 minutes for this task.

Keep them focused on their team's "process." They will be tempted to start working on the "task" of developing their training programs. Explain that they will begin work on developing their program in the next session.

6. Wrap Up

Time: 10 minutes

Ask them what was the most important thing they learned during this session. Explain that in the next session they will have an opportunity to apply what they have learned.

Review the session objectives and ask if they were reached. Explain that the next session will be the beginning of the simulation.

MATERIALS

Handout 13-1: The Role of the Trainer
Handout 13-2: The Four Stage Model
Handout 13-3: How to be an Effective Consultant
Handout 13-4: Characteristics of an Effective Training Team

Flipchart A: Session 13 Objectives
Flipchart B: Role of the Trainer
Flipchart C: The Four Stage Model
Flipchart D: Small Group Task
Flipchart E: Small Group Task

GUIDE TO SESSION 14: PLANNING AND MANAGING A TRAINING EVENT— 1. ASSESSING TRAINING NEEDS

Total Time: 2 hours, 45 minutes

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Presentation	10 minutes		A. Session 14 Objectives
2. Needs Assessment: Why and How?	Discussion	25 minutes		
3. Questions to Consider before a Needs Assessment	Presentation	25 minutes	Handout 14-1: Questions to Consider before Doing a Needs Assessment	
4. Preparation for the Interview	Small Group Task	40 minutes	Handout 14-2: Needs Assessment Interview Questions	B. Consultant Team Task
5. Practice Interviews	Skill Practice	45 minutes	Handout 14-3: Practice Interview	
6. Conclusions	Discussion	10 minutes		
7. Wrap Up/Journal	Discussion/Individual Task	10 minutes	Handout 14-4: Journal	

SESSION 14

PLANNING AND MANAGING A TRAINING EVENT—
1. ASSESSING TRAINING NEEDS

Total Time: 2 hours, 45 minutes

OBJECTIVES

By the end of the session participants will be able to

- Identify the major reasons for doing needs assessments
- List a range of simple, practical methods for gathering information about training needs
- Assess whether a performance problem can be addressed through training
- Use the interview method in gathering information about training needs

OVERVIEW

Before designing a training program, the trainer should determine the training needs of the participants. A proper analysis of these needs is critical so that the program will be useful to participants. A training program that repeats much of what participants already know, or one that is too advanced for them, will be frustrating to them. It is also a waste of scarce financial and human resources. Participants need to be committed to the program's goals. It is hard to obtain that commitment unless their needs have been assessed accurately.

The session begins with a discussion of the reason and methods for doing needs assessment and of questions to consider before doing a needs assessment. Participants then return to their consulting teams and prepare for conducting an interview with their client, played by the trainers. Finally, the teams interview the clients.

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PROCEDURES

1. Introduction — Time: 10 minutes

Present a brief session overview in your own words and present Flipchart A: Session 14 Objectives. Ask if they are clear.

2. Needs Assessment: Why and How? — Time: 25 minutes

Ask participants what they think are the reasons for doing needs assessment. Record their responses on a flipchart. Make sure the following points are included:

- Gather information from which the goals and the limits of the training program can be defined
- Identify skills that need to be learned
- Develop training goals and objectives
- Use data to develop training materials, such as role plays and case studies
- Target materials and learning activities to the appropriate level of the participants

Ask what can happen if a needs assessment is not done.

Ask participants what methods they use or know for conducting a needs assessment. List on a flipchart. Make sure the following methods are included:

- Review job descriptions/task analysis
- Have target group fill out a questionnaire
- Conduct interviews
- Observe performance/behaviors

3. Questions to Consider before a Needs Assessment   Time: 25 minutes

Present a brief lecturette about the basic pre-needs assessment question: to train or not to train. Explain that the chief test for determining if training is needed is the question: Does the person already know how to meet the performance standards for his or her job tasks?

If the answer is "Yes, the person knows how," there is no training need.

If the answer is "No, the person does not know how," there may be a training need, as well as some other needs.

Emphasize that a training need exists when a person lacks the knowledge or skill to perform an assigned task satisfactorily. Explain that the chief test for determining a training need is to find out whether a person knows how to meet the performance standards for a particular task. If the person knows how to meet those standards, then there is no training need. There may still be a performance problem, but it is not a training need, since more training will not solve the problem. The trainer must therefore be able to discriminate between performance problems that reflect training needs as opposed to those that do not.

Once the trainer has determined that training will be an appropriate answer to the performance problem, he or she meets with those who are familiar with the training situation. The trainer's purpose is to gather information that will enable her or him to tailor the training to fit the needs of the participants.

Distribute Handout 14-1: Questions to Consider before Doing a Needs Assessment. Ask participants to read it. Discuss the questions. Ask them what they would do if they discovered that training was not needed. The obvious answer is to alert the client that it may not be a training need. However, the client may insist on conducting the training program anyway. In that case, the trainer can either withdraw from the activity or try to adjust the program so that it will be as useful to participants as possible.

4. Preparation for the Interview   Time: 40 minutes

Explain that in this simulation, the teams will only have an opportunity to interview one client. Under normal circumstances, they would collect information from a number of people, such as supervisors, the people who are to be trained, and perhaps the target group's colleagues and counterparts in other divisions or organizations.

Present the following task on Flipchart B: Consultant Team Task:

- Develop questions to determine the information you need to design the program

- Use the pre-needs assessment questions in Handout 14-1 and Handout 14-2: Needs Assessment Interview Questions as a guide
- Select one person to conduct the interview with the client
- Others are "observers" and should be prepared to give feedback

Distribute Handout 14-2.

Note to the trainer

Make sure you are prepared to be interviewed about the participants in your proposed training program:

- Where are they from?
- Who are they?
- How many?
- What are their performance problems?
- What is the level of skill they need to attain?

Try to define the performance problems carefully in order to give participants the clearest guidance possible. For example, if you are focusing on hygiene education, participants may already have a solid background in conducting community assessments, but they may not be very effective in the delivery of a hygiene education session. In a technical area such as handpump maintenance or latrine construction, they may be technically qualified in construction techniques, but not in working with the community.

If you have a total of four groups, organize the interview so that each trainer (client) works with two consultant teams at the same time (there should be no more than four groups). Each team can take turns asking questions.

5. Practice Interviews — Time: 45 minutes

Set up the interviews by explaining that each interview should take no longer than 10 to 15 minutes. After the interview is over, each team should meet to allow the observers to share feedback with the interviewer for 5 minutes. Distribute Handout 14-3: Practice Interview.

When the interviews are over bring the whole group together and ask what it was like to be a consultant, what worked well, what was the most difficult thing to do. Then ask what type of data they were able to gather, and what other sources of information they would like to pursue if they had the opportunity to make the data more complete.

6. Conclusions

Time: 10 minutes

Ask them what they learned about needs assessments. Write their responses on a flipchart.

7. Wrap Up/Journal

Time: 10 minutes

Ask how they might approach needs assessments back in their work situations, what obstacles they might face, and how they can overcome those obstacles.

Ask them to write in their journals, Handout 14-4.

Review the main learning points from the session. Go over the session objectives and ask if they were reached.

MATERIALS

Handout 14-1: Questions to Consider before Doing a Needs Assessment
Handout 14-2: Needs Assessment Interview Questions
Handout 14-3: Practice Interview
Handout 14-4: Journal

Flipchart A: Session 14 Objectives
Flipchart B: Consultant Team Task

GUIDE TO SESSION 15: PLANNING AND MANAGING A TRAINING EVENT— 2. TRAINING PROGRAM DEVELOPMENT

Total Time: 5 hours and 30 minutes

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Presentation	10 minutes		The Four Stage Model (Flipchart C from Session 13) A. Session 15 Objectives
2. Steps for Training Program Development	Lecturette	10 minutes	Handout 15-1: Four Steps for Developing a Training Program Design	B. Four Steps for a Training Program Design
3. Set Priority Learning Areas and Program Objectives	Team Task	70 minutes		C. Team Task—Learning Areas and Objectives
4. Making a General Plan	Team Task	70 minutes	Handout 1-2: Workshop Schedule	D. Task—General Plan
5. Session Design	Lecturette	20 minutes		E. Session Design
6. Design of Detailed Sessions	Team Task	70 minutes		F. Session Design Task
7. Presentation of Training Plans and Session Designs	Presentations/Discussion	60 minutes		
8. Conclusions	Discussion	10 minutes		
9. Wrap Up/Journal	Discussion/Individual Task	10 minutes	Handout 15-2: Journal	

SESSION 15

PLANNING AND MANAGING A TRAINING EVENT— 2. TRAINING PROGRAM DEVELOPMENT

Total Time: 5.5 hours

OBJECTIVES

By the end of the session the participants will be able to

- Identify priority learning areas for a training workshop
- List the workshop goals related to those learning areas
- Develop a workshop schedule using a block calendar
- Determine an appropriate sequence and variety of learning activities for a workshop

OVERVIEW

This session continues the simulation by focusing on the design of a training program. Developing an effective design that is both varied and creative is a critical step in the training process. Without a good design, even skillful trainers will have difficulty.

This session begins with a lecturette on four basic steps to follow for training program development. Participants then work in their teams on the first of the four steps, developing training goals, based on the data collected in Session 14. They continue to work in their teams on step two, the development of a general training plan, by developing a block calendar showing the sequence and timing of sessions. They conclude their work in this session by designing the outline (step three) of two training sessions. The session ends with a presentation by each team of its training plan and session design for review by other participants and by the trainers. (Step four is the subject of Session 16.)

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PROCEDURE

1. Introduction — Time: 10 minutes

Refer to Session 13's Flipchart C: The Four Stage Model and show where you are in the simulation. Recall the needs assessment information that they gathered in their interviews during the previous session, and how it forms the basis for decisions on the content of the training event they will design or adapt.

Give the overview of the session in your own words. Display Flipchart A: Session 15 Objectives. Read them and ask if they are clear.

2. Steps for Training Program Development — Time: 10 minutes

Present a brief lecturette on the four steps for developing a training program design. Show the main points on Flipchart B: Four Steps for a Training Program Design, based on Handout 15-1: Four Steps for Developing a Training Program Design. Make the following additional comments:

- Information from a needs assessment provides a basis for selecting the learning areas to cover in a training event.
- Trainers list these learning areas in order of priority and feasibility to determine which ones should be addressed in a particular workshop.
- Then they translate the priority learning areas into workshop goals.
- Trainers use these goals to select session titles. Next, they organize the titles into a logical sequence for a workshop schedule, which they write on a block calendar. This block calendar provides a quick overview of an overall workshop schedule.

Once all the sessions have been selected, trainers begin the work of determining objectives and activities for each session. They keep in mind the needs and backgrounds of participants as well as the session learning objectives when selecting appropriate learning activities. They can select from a variety of activities, such as case studies, role plays, small group tasks, lecturettes, demonstrations, or field exercises. The timing and sequence of these activities are important considerations in designing sessions. The flow needs to be logical and the timing realistic. Finally, trainers fit their choice of activities into the seven-step session design model (presented in Session 7: Session Design Framework).

Distribute Handout 15-1 and ask if there are any questions.

Conclude by pointing out that all these elements will influence how you design or adapt an individual session.

3. Set Priority Learning Areas and Program Objectives Time: 70 minutes

Ask the teams to meet again and give them the following task on Flipchart C: Team Task—Learning Areas and Objectives:

- Review the information from the needs assessment interview and identify priority learning areas for a one-week workshop
- Write or adapt overall goals for a one-week program (no more than five)
- List the priority areas and goals on a flipchart
- Take 40 minutes for this task

Once they have finished their team work, get quick reports from each team on their goals and the learning needs they address. Emphasize the draft nature of these goals and how they could change as they proceed with their planning.

4. Making a General Plan Time: 70 minutes

Ask each team to develop a one-week general plan according to Flipchart D: Task—General Plan:

- Write the titles of the sessions for the one-week program (based on the overall goals)
- Develop a schedule on a block calendar showing the sequence and required time for each session
- Take one hour for this task

Refer them to Handout 1-2: Workshop Schedule and explain that this handout shows a block calendar.

Walk around and help each group with its design.

5. Session Design

Time: 20 minutes

Emphasize to participants that it is not always possible to complete an overall training plan without filling in some of the details. Deliver a lecturette using Flipchart E: Session Design to highlight the major steps listed below:

- *General Design*—explain that the needs assessment, the development of objectives, and the block calendar make up the general design (as they have done in Steps 3 and 4).

- *Learning Activities*—refer participants to the techniques used in Week One of this workshop: small group tasks, case studies, field exercises, lecturettes/demonstrations, and role plays. Explain that these are learning activities and that they must decide which of these activities are appropriate for a given session. The criteria for deciding the appropriateness of, or need for, a particular technique are

  — Does it answer the group's needs?
  — How does it contribute to meeting a particular objective?
  — Will it help to improve job performance?

- *Sequence of Activities*—explain that the following considerations are important to determine appropriate sequencing and timing of an activity:

  — Variety helps keep interest
  — Logical flow and transition between one technique and the other
  — Time available—be realistic about what can be done
  — Make sure the activities follow the seven-step model (refer to Session 7: Session Design Framework)

Discuss another aspect of timing of activities by using the lecturette technique as an example. Explain that giving a lecturette at the end of the day is not usually recommended because it is an activity that is a bit more passive than the others; also, it involves acquiring new knowledge. Participants may not retain much of what is presented because they are likely to be tired and not as attentive as earlier in the day. A more active technique focused on skill practice would work better, such as a role play, a small group task, or even a group discussion based on an earlier presentation. It is also a good time for individual reflection exercises, such as making entries in a training journal.

6. Design of Detailed Sessions — Time: 70 minutes

Using Flipchart F: Session Design Task, give the teams the following task:

- Identify session-level objectives for two sessions from the training plan you are using
- Outline the session activities and be prepared to explain the objectives and the sequence of activities in those sessions
- Write the objectives and activities on a flipchart in outline form
- Take one hour for this task

7. Presentation of Training Plans and Session Designs — Time: 60 minutes

Ask each team to present its one-week training plan and the session-level objectives and activities for the two sessions they selected. Emphasize the criteria used for sequencing and timing of activities in your feedback on their presentations.

Use some of the following processing questions when appropriate:

- Do the goals lend themselves to a five-day program?
- How does "x" session relate to an overall workshop goal?
- How much variety is there in the use of techniques such as case studies, small group tasks, role plays, demonstrations, lecturettes, and field exercises?
- Is the time allotted to each session realistic? Does it include enough time for opening and closing the workshop, including evaluation?
- Does each session follow the seven-step model?

8. Conclusions — Time: 10 minutes

Ask participants what they learned during this session. Write their answers on a flipchart.

9. Wrap Up/Journal

Time: 10 minutes

Ask participants to fill out their journal, Handout 15-2, and to think of how they might apply what they have learned back in their work situations. When they have finished writing, ask for a few examples. Then return to the session objectives and ask if they were reached.

MATERIALS

Handout 15-1: Four Steps for Developing a Training Program Design
Handout 1-2: Workshop Schedule
Handout 15-2: Journal

Flipchart A: Session 15 Objectives
Flipchart B: Four Steps for a Training Program Design
Flipchart C: Team Task—Learning Areas and Objectives
Flipchart D: Task—General Plan
Flipchart E: Session Design
Flipchart F: Session Design Task

GUIDE TO SESSION 16: PLANNING AND MANAGING A TRAINING EVENT— 3. ORGANIZING THE EVENT

Total Time: 1 hour, 45 minutes

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Presentation	5 minutes		A. Session 16 Objectives
2. Making Arrangements for Delivery of Training	Discussion	20 minutes	Handout 16-1: Making Arrangements for Delivery of Training	
3. Identifying Delivery Problems	Discussion	20 minutes		
4. How to Solve Delivery Problems	Small Group Task	50 minutes		B. Problem-Solving Task
5. Wrap Up	Discussion	10 minutes		

SESSION 16

PLANNING AND MANAGING A TRAINING EVENT—
3. ORGANIZING THE EVENT

Time: 1 hour, 45 minutes

OBJECTIVES

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

- Identify what should be considered when arranging training delivery—budget, logistics, staff, site selection, and preparation
- Develop strategies for handling training implementation problems

OVERVIEW

The best designed training program will fail if appropriate arrangements are not made well in advance to ensure that sufficient resources are allocated to the program; the site is adequate and available; enough and the right type of participants are invited; housing and food are set up; handouts are prepared; equipment is available and functioning; and learning materials are provided.

Even if all the arrangements are properly made, problems can occur during delivery of training: equipment can break down; participants may not show up on time; they may not be satisfied with logistical arrangements; they may react negatively to the design; they may take longer than expected to complete certain exercises, and so on.

In this session, participants develop a list of the things they must do to make sure that all of the necessary arrangements are made for a training event. Then, they identify problems that can occur during delivery of training and develop ways to preempt or respond to them.

PROCEDURES

1. Introduction

Time: 5 minutes

Refer to Session 13's <u>Flipchart C: The Four Stage Model</u> and show where you are in the simulation.

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Give the overview of the session in your own words. Display Flipchart A: Session 16 Objectives. Read them and ask if they are clear.

2. Making Arrangements for Delivery of Training — Time: 20 minutes

Point out that every training situation is unique—location, number of participants, resources available. Ask participants what to consider when making arrangements for training program delivery. Record their responses on a flipchart.

If necessary, supplement their list with the considerations in Handout 16-1: Making Arrangements for Delivery of Training. Distribute the handout.

Emphasize the importance of planning far in advance of a workshop. Give some examples from your own experience of problems that have occurred because the arrangements were not adequately planned.

3. Identifying Delivery Problems — Time: 20 minutes

Recall for the group all the preparations they have made for their one-week training program. Go to the flipcharts developed by a couple of the teams and point out the programs they have designed, emphasizing the sense of accomplishment they should feel about their preparations.

Explain that they should now imagine that they are delivering their training program. Ask them what problems they may face when they deliver the program and list them on a flipchart.

4. How to Solve Delivery Problems — Time: 50 minutes

Ask each team to meet and do the task on Flipchart B: Problem-Solving Task, as follows:

- Review the problems listed on the flipchart
- Choose two or three problems you want to address
- Recommend ways to
  - Avoid each problem before it occurs
  - Handle it when it does occur

- Take 20 minutes for this task

Before they begin the task, give them a couple of examples of ways to handle one or two of the problems they identified.

When they have finished their team work, ask each group to report on one of the problems they chose and how they would deal with it. Write their answers on a flipchart.

5. Wrap Up

Time: 10 minutes

Ask them what they plan to focus on in planning arrangements for training and for addressing problems during training when they return to their work situations.

Review the session objectives and ask if they were reached.

MATERIALS

Handout 16-1: Making Arrangements for Delivery of Training

Flipchart A: Session 16 Objectives
Flipchart B: Problem-Solving Task

GUIDE TO SESSION 17: PLANNING AND MANAGING A TRAINING EVENT— 4. EVALUATION OF TRAINING

Total Time: 3 hours, 15 minutes

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Discussion	10 minutes		A. Session 17 Objectives
2. Why and What to Evaluate	Discussion/Lecturette	30 minutes	Handout 17-1: Evaluation—A Measurement of Four Basic Areas	
3. Develop an Evaluation Strategy	Small Group Task	30 minutes		B. Evaluation Task
4. How to Measure	Discussion/Presentation	25 minutes	Handout 17-2: Evaluation Methods	
5. Develop an Overall Evaluation	Small Group Task	45 minutes		C. Overall Evaluation Task
6. Present Evaluation Plans	Presentations	35 minutes		
7. Conclusions	Discussion	10 minutes		
8. Wrap Up/Journal	Individual Task/Discussion	10 minutes	Handout 17-3: Journal	

SESSION 17

PLANNING AND MANAGING A TRAINING EVENT—
4. EVALUATION OF TRAINING

Time: 3 hours, 15 minutes

OBJECTIVES

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

- Identify the reasons for evaluating training
- List the four basic areas of evaluation
- Develop an overall evaluation strategy for a one-week course

OVERVIEW

Evaluation is the final step in a workshop. It helps to assess the effectiveness of a workshop and provide information to improve future programs. This session explores the evaluation of training.

The session begins with a discussion of why evaluation is important and what to evaluate. Trainers present four basic measurement areas for evaluation: (1) reaction, (2) learning, (3) behavior, and (4) results. Participants then return to their teams to develop an evaluation strategy for the training program they have developed in the previous sessions. The trainers continue the session with a presentation on the different methods that are used for measuring the effects of training. Finally, after selecting one or more assessment methods, each team prepares and presents its workshop evaluation plan.

PROCEDURE

1. Introduction

Time: 10 minutes

Ask participants how they evaluate their training programs, or how they have seen others evaluate training. Most answers will probably center on participant satisfaction with the training program.

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Explain that you have now reached the last stage in the four stage model for planning and monitoring a training event, that of evaluation. Display Flipchart A: Session 17 Objectives. Read them and ask if they are clear.

2. Why and What to Evaluate

Time: 30 minutes

Ask participants why they need to evaluate their training programs. Emphasize that in addition to providing information that will help future programs be more effective, evaluations can be used to justify and support proposed training programs and budgets.

Ask what should be evaluated. Then present a brief lecturette based on Handout 17-1: Evaluation—A Measurement of Four Basic Areas.

Explain that most evaluation addresses the first area, "measuring reaction." It is the simplest approach, yet it only looks at the participants' perspective. Therefore, one does not know how much the participant has really learned.

The second area, "measuring learning," is more difficult because the trainer must assess both knowledge and skill attainment. Knowledge attainment can be fairly objectively measured through a pre- and post-test. Skill attainment is measured more subjectively through observation. Nonetheless, measuring learning can still be done within the framework of a training program.

The third area, "measuring behavior," is very difficult because it requires post-workshop assessment. It is potentially the most expensive, due to the need for collecting pre- and post-workshop data on behavior and contacting participants in several different locations. Successful behavior measurement can be the most convincing determination of the success of a workshop. However, it is hard to control the external variables that are not related to the workshop.

The fourth area, "measuring results," is also very difficult because it assesses impact of training on organizational performance. As with "measuring behavior," it is hard to control those variables that are not related to training.

Distribute Handout 17-1: Evaluation—A Measurement of Four Basic Areas.

3. Develop an Evaluation Strategy

Time: 30 minutes

Ask participants to return to their teams and complete the task on Flipchart B: Evaluation Task, as follows:

- Review your training goals and program, and note what you want to evaluate

- List in four columns (1. reaction, 2. learning, 3. behavior, 4. results) the things you want to evaluate

- Take 25 minutes for this task

4. How to Measure Time: 25 minutes

Ask participants what methods they know for measuring the effects of training. List them in four columns on a flipchart (reaction, learning, behavior, results) and supplement them as necessary from the following list:

Reaction	Learning	Behavior	Results
Opinion/attitude questionnaire	Pre-test/post-test	Follow-up participant evaluation forms	Follow-up participant evaluation forms
Trainer/participant group evaluation session	Trainer observation of participants	Follow-up supervisor evaluation forms	Follow-up supervisor evaluation forms
	Post-training practice session	Action planning follow-up	

Ask them what the advantages and disadvantages are of using some of these techniques. Encourage them to think of such concerns as cost, time, and availability of participants.

Distribute Handout 17-2: Evaluation Methods.

5. Develop an Overall Evaluation Time: 45 minutes

Ask participants to return to their teams and present Flipchart C: Overall Evaluation Task, as follows:

- Look at the list of things you want to evaluate (from the previous task)

- Decide which methods you would use to evaluate each item on your list

- Write your list of things to be evaluated and the methods you want to use on a flipchart

- Take 35 minutes for this task

Explain that they may decide to drop some of the things they wanted to evaluate due to constraints they see in using some of the methods.

6. Present Evaluation Plans — Time: 35 minutes

Give each team five minutes to present its evaluation plan. Allow only clarification questions after each presentation. Once all presentations are made, point out the similarities and differences among the evaluation plans. Emphasize the importance of having a practical, doable plan, even if it means only using a participant reaction form. At least one evaluation measurement will have been used.

7. Conclusions — Time: 10 minutes

Ask participants what they learned about evaluating training. Write their answers on a flipchart.

8. Wrap Up/Journal — Time: 10 minutes

Ask them to turn to their journal, Handout 17-3, and think about what they learned and how they might apply it in their work. Once they have finished, ask for a few examples.

Review the session objectives and ask if they were reached.

MATERIALS

Handout 17-1: Evaluation—A Measurement of Four Basic Areas
Handout 17-2: Evaluation Methods
Handout 17-3: Journal

Flipchart A: Session 17 Objectives
Flipchart B: Evaluation Task
Flipchart C: Overall Evaluation Task

GUIDE TO SESSION 18: PREPARATION OF PRACTICE TRAINING ROUND TWO

Total Time: 2 hours

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Presentation	5 minutes		A. Session 18 Objectives
2. Selecting the Session	Small Group Task	25 minutes		B. Small Group Task
3. Preparing the Session	Task in Pairs	1 hr., 30 min.	Handout 18-1: Session Preparation Task	

SESSION 18

PREPARATION OF PRACTICE TRAINING ROUND TWO

Time: 2 hours

OBJECTIVES

By the end of the session participants will be able to

- Identify where a session fits in the overall framework of a training event
- Plan for the delivery of an entire training session
- Prepare appropriate visual aids needed for the session
- Work collaboratively with another trainer to plan the delivery of a session

OVERVIEW

The key to the success of a training session lies in carefully thought out preparation. In this preparation, the trainer either designs a session training plan or adapts an existing design. In either case, the design follows the steps in the Session Design Framework described in Session 7: (1) climate setting, (2) the objectives, (3) the experience, (4) processing, (5) generalizing, (6) applying, and (7) closure (or wrap up).

In this session, participants work in groups of two; each group adapts one of the sessions participants selected in their larger group of four to six people when preparing their training plan in Session 15. They prepare to present their session with a co-trainer, dividing up the session among themselves, rehearsing various parts of the session with each other, and preparing the flipcharts and other visual aids necessary for delivery of the session. Each practice training session should take no longer than 45 minutes.

The trainers circulate among the groups, coaching them on their training plan preparation and making sure all the groups are ready to present when this session is over.

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PROCEDURES

1. Introduction — Time: 5 minutes

Explain that participants will spend the entire session preparing a 45-minute presentation based on one of the sessions they designed in Session 15. Present the session overview in your own words. Display and read Flipchart A: Session 18 Objectives. Ask if they are clear.

2. Selecting the Session — Time: 25 minutes

Ask participants to meet again in the groups they formed during the past five sessions. Give them the following task on Flipchart B: Small Group Task:

- Look at the training plan and the two sample sessions you selected in Session 15
- Identify sessions or parts of sessions that can be adapted to a 45-minute time limit
- Divide into pairs; each pair selects the training session it will present (or the portion of the training session it will present)
- Take 20 minutes for this task

Circulate among the groups to assist them in their decisions and to find out what they have finally decided to present.

3. Preparing the Session — Time: 1 hour, 30 minutes

Tell participants to prepare their sessions in groups of two. Distribute Handout 18-1: Session Preparation Task and go over it. Explain that they will deliver the session they prepare tomorrow. They will break up into two tracks as they did in the first round of practice training.

Make sure they are clear about the need for a written training plan and that all their visual aids should be ready by the end of this session. If photocopying is needed, make arrangements in advance of the session so that participants will not be delayed. Provide them with flipchart paper and markers as needed.

Circulate among the groups, helping them with their training plans as much as possible without being too prescriptive.

Explain how you have assigned the presentation times. Show a block calendar with the names in each block of time. Allow 45 minutes for each presentation and 30 minute for feedback from the trainer(s) afterward.

MATERIALS

Handout 18-1: Session Preparation Task

Flipchart A: Session 18 Objectives
Flipchart B: Small Group Task

GUIDE TO SESSION 19: PRACTICE TRAINING ROUND TWO

Total Time: 7 hours, 45 minutes

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Practice Training	Practice	7 hours		
2. Discussion	Discussion	30 minutes	Handout 19-1: Observer's Checklist	
3. Wrap Up/Journal	Individual Task	15 minutes	Handout 19-2: Journal	

SESSION 19

PRACTICE TRAINING ROUND TWO

Time: 7 hours, 45 minutes

OBJECTIVES

By the end of the session participants will be able to

- Deliver a session using the seven steps in the design framework
- Work with a co-trainer
- Identify those areas in which they need to improve their skills

OVERVIEW

Practice training is the key component of a training of trainers workshop. It gives participants a chance to improve on existing training knowledge and skills and to try out new skills in a situation in which more experienced trainers can give them feedback.

This session is divided into a total of five modules, each lasting 1 hour and 15 minutes, 45 minutes for a session presentation by a team of two participants, and 30 minutes for feedback. If the workshop has 20 participants divided into two tracks, there will be five practice sessions in each track. The trainer can use Handout 19-1: Observer's Checklist as a guide for giving feedback to participants. This checklist may be handed to participants after the session is over. However, it should not be used as part of a formal job performance review.

The use of a videotape machine can greatly enhance the feedback session. When using a videotape, the trainer notes highlights of the session and some portions needing improvement by keeping track of the counter on the machine. After giving some verbal feedback, the trainer briefly runs the tape showing the portions of the session he or she has selected for review.

The verbal feedback session usually begins with the trainer asking the participants who were not delivering the session what went well and what could be improved, then asking the practice trainers what they learned. Encourage them to write down what they learned. Then show excerpts from the videotape, if available.

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The trainers should take at least 30 to 45 minutes at the end of the practice session to discuss what participants learned and where they want to make improvements and to provide time for participants to write some reflections in their journal.

PROCEDURES

1. Practice Training — Time: 7 hours

2. Discussion — Time: 30 minutes

Ask the participants the following:

- What did you learn about delivering training?
- What did you find difficult?
- What would you like to improve on when you deliver your next training session back at work?

Make any general comments based on the practice training sessions, highlighting those things that went well.

Distribute Handout 19-1: Observer's Checklist.

3. Wrap Up/Journal — Time: 15 minutes

Allow time for participants to write in their journal. Distribute Handout 19-2: Journal.

MATERIALS

Handout 19-1: Observer's Checklist
Handout 19-2: Journal

GUIDE TO SESSION 20: BACK-AT-WORK PLAN

Total Time: 2 hours, 45 minutes

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Presentation	5 minutes		A. Session 20 Objectives
2. Review Journal Entries	Individual Task	50 minutes	Handout 20-1: Action Plan	B. Individual Journal Review
3. Implementation Plan	Individual/Small Group Tasks	65 minutes	Handout 20-2: Implementation Plan	C. Implementation Task
4. Discuss Implementation Plans	Discussion	40 minutes		
5. Wrap Up	Discussion	5 minutes		

SESSION 20

BACK-AT-WORK PLAN

Time: 2 hours, 45 minutes

OBJECTIVES

By the end of the session participants will be able to

- Develop a plan for applying what they learned from the workshop
- Develop some ideas for implementing those plans

OVERVIEW

Application planning provides a final transition between the workshop and the participants' activities back at work. It is the final step in the experiential learning cycle, thus concluding a series of learning experiences.

In this session, participants review all their journal entries to highlight the main learning points of the workshop and plans that they have made to apply these points back in their work situations. They consolidate these points into an implementation plan that they can refer to and share with their colleagues and supervisors when they return to work.

PROCEDURES

1. Introduction — Time: 5 minutes

State the overview in your own words and review from Flipchart A: Session 20 Objectives.

2. Review Journal Entries — Time: 50 minutes

Give participants the following task on Flipchart B: Individual Journal Review:

- Review all your journal entries from the workshop
- Enter the most important learning points from the workshop and possible actions you plan to undertake on Handout 20-1: Action Plan

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- Take one hour for this task

Distribute Handout 20-1: Action Plan. Explain that these journal summaries, like their journals, are for their use and that you do not intend to collect them, nor do you intend to collect the implementation plans they will develop later in the session.

3. Implementation Plan

Time: 65 minutes

Explain that this exercise is intended to help them plan specific actions and to determine how they will implement them. Give them the following task on Flipchart C: Implementation Task:

- Review your list of possible actions from your action plan
- List the actions you would like to undertake in the next six months in the left-hand column of Handout 20-2: Implementation Plan
- For each action, complete in the other columns the following elements: desired outcomes, resources needed, possible constraints, and strategy to overcome the constraints and implement the plan
- Take one hour for this task

Distribute Handout 20-2: Implementation Plan. Ask for an example of a possible action from a participant, then walk through each column on the implementation plan, asking for examples of how that action might be implemented and offering your ideas as well. If the task is now clear to everyone, have them begin their work.

For this task, you may want to have participants work in teams of two or three people if there are people from the same district or division who will be collaborating in some way to plan and conduct training activities after the workshop. If the group is very diverse, another alternative is to give people 30 minutes to work individually on their own implementation plan, and then to work in pairs in order to get some initial feedback and suggestions from others.

4. Discuss Implementation Plans

Time: 40 minutes

Ask for examples from the participants' implementation plans. Make comments and encourage participants to comment on each action. You will probably have time to review four or five actions.

5. Wrap Up

Time: 5 minutes

Review the session objectives and ask if they were reached.

MATERIALS

Handout 20-1: Action Plan
Handout 20-2: Implementation Plan

Flipchart A: Session 20 Objectives
Flipchart B: Individual Journal Review
Flipchart C: Implementation Task

GUIDE TO SESSION 21: WORKSHOP EVALUATION AND CLOSING CEREMONIES

Total Time: 3 hours

SUBJECT	PROCEDURE	TIME	HANDOUTS/MATERIALS	FLIPCHARTS
1. Introduction	Presentation	10 minutes		
2. Fill out Evaluation Form	Individual Task	40 minutes	Handout 21-1: Workshop Evaluation	
3. Participant Suggestions	Discussion	30 minutes		
4. Wrap Up	Discussion	5 minutes		
5. Closing Ceremonies		90 minutes	Certificates (if desired)	

SESSION 21

WORKSHOP EVALUATION AND CLOSING CEREMONIES

Total Time: 3 hours

OBJECTIVES

By the end of this session the participants will have

- Evaluated the workshop
- Heard formal closing statements by trainers, appropriate officials, and participant representatives

OVERVIEW

The evaluation form asks the participants to score how well each overall workshop goal was attained and to provide their comments on the workshop in response to questions based on success analysis. In addition, the session calls for participants to share their suggestions openly with trainers so that areas not covered by the form can be discussed or so that participants may better explain some of their comments.

The closing ceremonies are intended to be an appropriate ending to the workshop with opportunities for all the people involved in the training program, including trainers, participants, and ministry or other officials if appropriate. The ceremonies allow for formal statements, notes of thanks, certificates of awards if possible, and farewells.

The trainers plan the closing ceremonies with all those involved (except participants) before the start of the workshop and make arrangements for producing certificates, informing officials, and taking care of logistics. Then, two or three days before the end of the workshop, trainers can ask participants to select one or two persons who will speak on their behalf.

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PROCEDURES

1. Introduction — Time: 10 minutes

Describe the overall schedule for this last session: workshop evaluation (1 hour and 20 minutes) and closing ceremonies (1 to 1.5 hours).

Introduce the workshop evaluation by explaining how important it is for trainers to be able to receive the honest evaluation of workshop participants of the work they have done together. Mention that their comments will help you improve the workshop in the future.

Point out that the written evaluation form they will receive is an example of how to adapt success analysis to the specific needs of a training event. It is anonymous to encourage the greatest degree of openness, though people may sign their names if they wish. It is divided into two parts:

- Part I: How well each of the workshop goals was reached. It uses a four-point scale to measure how well the goals were attained. Participants should circle the number that best expresses how well they thought the goal was accomplished.

- Part II: Several open-ended questions about the workshop drawn from success analysis.

Finally, tell participants you will ask for some verbal feedback on the workshop so that areas not covered by the form may be discussed or so that participants may better explain the comments they may be willing to share with the group.

2. Fill out Evaluation Form — Time: 40 minutes

Distribute Handout 21-1: Workshop Evaluation and review it with the participants. Give them 35 minutes to fill it out.

3. Participant Suggestions — Time: 30 minutes

Ask the participants to review their answers to questions 6, 7, and 8 in Part II. Ask them if they would be willing to share some of their suggestions for improving the workshop with you.

List their suggestions on a flipchart, review them, and discuss them. Find out which suggestions are most commonly held and most important to the participants.

4. Wrap Up

Time: 5 minutes

Review the key suggestions. Thank the participants for their comments and their active participation throughout the workshop.

5. Closing Ceremonies

Time: 90 minutes

Activities to be decided on by training staff, lasting no more than 90 minutes.

MATERIALS

Handout 21-1: Workshop Evaluation

Certificates (if desired)

Handout 1-1

OVERALL WORKSHOP GOALS

By the end of the workshop, participants will be able to

1. define the basic principles of adult education and of experiential learning;

2. use a design framework for preparing and carrying out training sessions;

3. demonstrate facilitation skills (paraphrasing, summarizing, asking questions);

4. give and receive constructive feedback;

5. describe the characteristics and the learning purpose of such training techniques as case studies, role plays, small group tasks, lecturettes, demonstrations, and field exercises;

6. deliver a session using one of these training techniques;

7. plan for and manage a training event; and

8. adapt this training methodology for use in back-at-work situations.

Workshop Schedule

WEEK 1

TIME	DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
8 am	(1) Opening Ceremony Ice Breaker Expectations Goals/Schedule Norms (2.5 hr.)	(3) Facilitation Skills: Paraphrasing, Asking Questions, Summarizing, and Using Encouragers (3.5 hr.)	(5) Giving and Helping Others Give Feedback (2 hr.) (6) Case Study Clinic (3.5 hr.)	(8) Lecturettes and Demonstrations/Preparation for Practice (3.5 hr.)	(9) Practice Training Round One
12 p.m.	L	U	N	C	H
2 p.m.	(2) Principles of Adult Education and Experiential Learning (3.5 hr.)	(4) Small Group Task Clinic (3.5 hr.)	(6) Case Study Clinic (7) Session Design Framework (1.5 hr.)	(9) Practice Training Round One (7 hr., 45 min.)	(9) Practice Training Round One (10) Field Exercises (2 hr., 10 min.) (11) Week One Evaluation (30 min.)
6 p.m.	End	End	End	End	End

Workshop Schedule

WEEK 2

TIME	DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
8 am	(12) Role Plays (2 hr., 15 min.) (13) Planning and Managing a Training Event: Role of the Trainer (2 hr., 45 min.)	(14) 1. Assessing Training Needs (15) Planning and Managing a Training Event: 2. Training Development Program (5.5 hr.)	(16) Planning and Managing a Training Event: 3. Organizing the Event (1 hr., 45 min.) (17) Planning and Managing a Training Event: 4. Evaluation of Training (3 hr., 15 min.)	(19) Practice Training Round Two (7 hr., 45 min.)	(19) Practice Training Round Two (20) Back-at-Work Plan (2 hr., 45 min.)
12 p.m.	L	U	N	C	H
2 p.m.	(13) Role of the Trainer (14) Planning and Managing a Training Event: 1. Assessing Training Needs (2 hr., 45 min.)	(15) 2. Training Program Development	(17) 4. Evaluation of Training (18) Preparation of Practice Training Round Two (2 hr.)	(19) Practice Training Round Two	(21) Workshop Evaluation and Closing Ceremonies (3 hr.)
6 p.m.	End	End	End	End	End

TRAINING INVENTORY*

In order to determine your preferences in setting the climate for a training event, think of how you feel a training event should be...a training event that would be a positive learning experience for you as a participant...one that would be comfortable for you as a trainer to lead. Read each statement below and decide if it applies to this experience. If so, place a check mark next to the number in the space provided. If the statement does not describe your preferred training event, leave it blank.

_____ 1. The trainer presents the subject material in the workshop.

_____ 2. The trainer participates in the learning exercises with the workshop participants.

_____ 3. The trainer designs all the activities for the workshop.

_____ 4. The participants often critique each other's work with little or no direction from the trainer.

_____ 5. The participants and the trainer share responsibility for decisions about what subject material to explore.

_____ 6. Participants explore their curiosity and work to satisfy themselves with little trainer direction.

_____ 7. The trainer's principal role would be to encourage participants to continue working together, exploring alternatives and moving toward their own goals.

_____ 8. The trainer designs and describes to the participants the well-detailed plan and organization for the workshop.

_____ 9. The participants would be encouraged to develop ways to accomplish their own goals, even if it meant changing somewhat the workshop plan.

_____ 10. The trainer would make the decisions on what materials to be used in the course.

_____ 11. The trainer would be very accepting of the participants' ideas and thoughts even if he/she did not agree, or knew them to be wrong.

*Training Resources Group, Alexandria, Va., 1981.

_____ 12. Participants would be expected to share responsibility with the trainer to adapt the workshop to meet their needs.

_____ 13. The trainer is likely not to know the subject matter as much as the participants.

_____ 14. The trainer would allow the participants to make most of the decisions about whether the workshop was successful or not.

_____ 15. The trainer allows the participants' comments and needs expressed during the workshop to influence much of the design.

_____ 16. Participants are expected to evaluate their own progress through the course.

_____ 17. The trainer allows the participants to determine how much time should be spent on each topic.

_____ 18. Participants should spend a good deal of time learning from the trainer's well-executed lectures and demonstrations.

_____ 19. Participants are expected to challenge the trainer's ideas.

_____ 20. The participants are told precisely what to expect from the workshop.

_____ 21. The trainer does not need to remain in the room while small group discussion is taking place.

_____ 22. The participants' discussions are always tightly controlled so that time can be used wisely.

_____ 23. The trainer almost never makes substantive inputs. He/she would not be expected to be knowledgeable about the subject.

_____ 24. The trainer assumes full responsibility for the learning activities.

_____ 25. Participants are asked to help design the workshop.

_____ 26. The participants rely on the knowledge of the trainer for many of the substantive answers they are seeking.

_____ 27. The trainer decides how successful the workshop was.

_____ 28. The participants would define the subjects and issues that should be covered in the workshop; they would be responsible for looking for answers. The trainer would assist in helping this to happen.

_____ 29. The participant decides with the trainer whether or not the workshop would be beneficial. Once this has happened, the participant would be expected to attend.

_____ 30. The participant should make the decision on whether or not the course would be beneficial and should be free to leave during the course if he/she thinks it is not helpful.

TRAINING INVENTORY SCORING SHEET*

Directions: Go back over your score sheet. Count the number of checks you have in column A (i.e., if you checked #1, then check it on the line of this answer sheet. If you did not check #3, leave it blank. The A items, then, are 1, 3, 8, 10, 18, 20, 22, 24, 26, and 27). Write the total number of checks at the bottom in A____. Do the same for columns B and C.

	A	B	C
	1. ____		
		2. ____	
	3. ____		
			4. ____
		5. ____	
			6. ____
		7. ____	
	8. ____		
			9. ____
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		11. ____	
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			13. ____
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		15. ____	
			16. ____
			17. ____
	18. ____		
		19. ____	
	20. ____		
			21. ____
	22. ____		
			23. ____
	24. ____		
		25. ____	
	26. ____		
	27. ____		
		28. ____	
		29. ____	
			30. ____
TOTALS	A. ____	B. ____	C. ____

*Training Resources Group, Alexandria, Va., 1981.

TRAINING INVENTORY INTERPRETATION WORK SHEET*

COLUMN	LEARNER STYLE	LEARNING NEEDS	TRAINER ROLE	TRAINER BEHAVIORS	LEARNER BEHAVIORS
A	DEPENDENT (may occur in introductory courses, new work situations, language courses in which learner has little or no information on entering course)	structure direction external reinforcement encouragement esteem from authority	director expert authority	gives answers lectures demonstrates assigns checks encourages tests reinforces transmits content grades designs materials sets goals	accepts answers depends on trainer questions trainer resists answers cautions learns from trainer
B	COLLABORATIVE (may occur when learner has come with knowledge, information, ideas and would like to share them or try them out)	interaction practice observation participation peer challenge peer esteem experimentation	collaborator co-learner environment setter	interacts transmits content occasionally questions provides resources models provides feedback coordinates evaluates jointly manages group process helps set goals	sets goals questions interacts evaluates uses/finds resources explores uses feedback takes risks makes decisions grows uses trainer to do all of the above learns from everyone
C	INDEPENDENT (may occur when learner has much more knowledge or skill on entering the course and wants to continue to search on own, or has had successful experience working through new situation alone; may feel trainer cannot offer as much as he/she likes)	internal awareness experimentation time nonjudgmental support	facilitator	allows provides requested feedback helps to provide resources consults listens negotiates observes group process	sets goals self-dependent finds own solutions little/no reliance on trainer makes decisions evaluates learns from everyone

*Training Resources Group, Alexandria, Va., 1981.

The Experiential Approach To Training

by James A. McCaffery

Experiential learning is exactly what the name implies – learning from experience. The experiential approach is learner-centered and allows the individual trainees to manage and share responsibility for their own learning with their teachers. Effective training strategies which incorporate experiential learning approaches provide opportunities for a person to engage in an activity, review this activity critically, abstract some useful insight from the analysis, and apply the result in a practical situation. (Gudykunst and Hammer, 1983, provide a brief historical review of the experiential approach.) A graphic representation of the model is presented below and may be applied to cross-cultural training in the following ways:

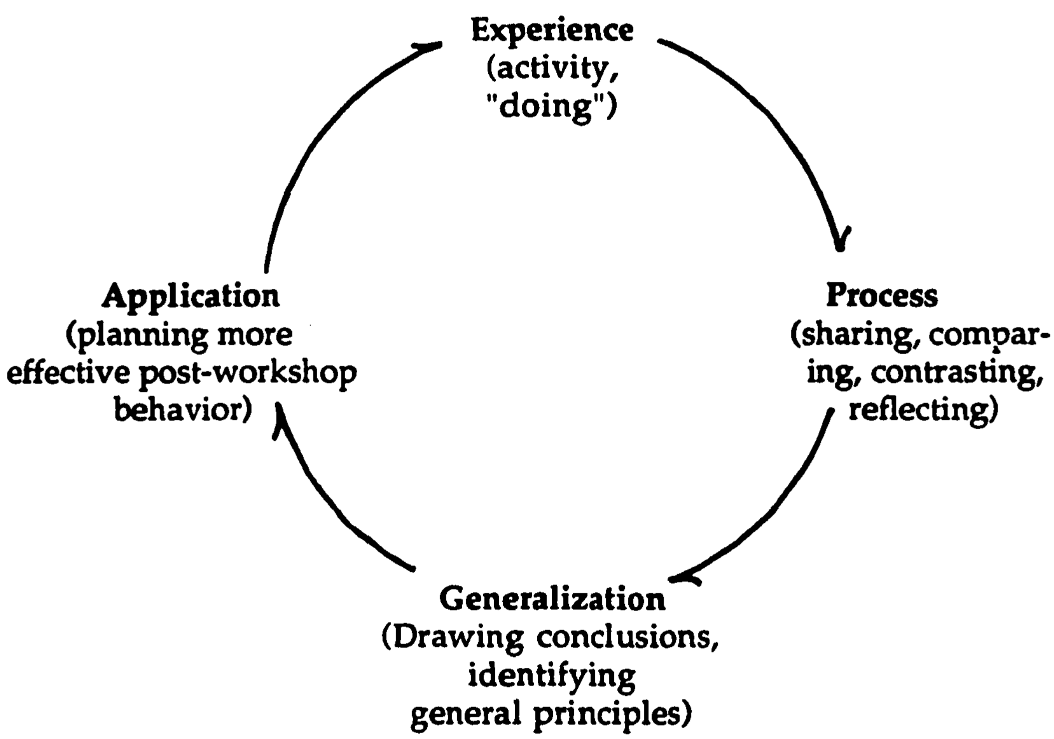

Figure 1
The Experiential Model

This is an excerpt from a paper by Dr. McCaffery entitled, "Independent Effectiveness: A Reconsideration of Cross-Cultural Orientation and Training." International Journal of Intercultural Relations Vol. 10 (1986): 159-178.

Experience

The experience phase is the initial activity and the data-producing part of the experiential learning cycle. This phase is structured to enable participants to become actively involved in "doing" something. Doing, in this instance, has a rather broad definition, and includes a range of activities like the following:

- case studies
- role plays
- simulations
- games
- lecturettes
- films and slide shows
- skill practice
- completing an instrument
- living with a family from another country

This sample list indicates that the range of training techniques varies from the more passive and artificial (lecturette) to the more active and real (living with a family). Exactly which technique one chooses as an educational activity would depend largely on the session goals.

Process

Once the experience stage is completed, the trainer or instructor would guide the group into the process part of the cycle. During this phase, participants reflect on the activity undertaken during the experience phase, and they share their reactions in a structured way with the whole group. This may happen on an individual basis, in small work groups, or in a full training group. Individuals share both their cognitive and affective reactions to the activities in which they have engaged. In addition, with trainer assistance, they try to link these thoughts and feelings together in order to derive some meaning from the experience.

The trainer's role as facilitator is very important during each phase of the cycle. During the process phase, he/she should be prepared to help the participants think critically about the experience and to help the participants verbalize their feelings and perceptions, as well as draw attention to any recurrent themes or patterns which appear in the participants' reactions to the experience. The trainer's role involves helping the participants to conceptualize their reflections on the experience so that they can move toward drawing conclusions.

Generalization

The generalization stage is that part of the experiential learning cycle in which the participants extract conclusions and generalizations which might be derived from, or stimulated by, the first two phases of the cycle. During this phase, participants are helped to "take a step back" from the immediate experience and discussion, and to think critically in order to draw conclusions that might be generalizable to "real life" or to a particular theoretical construct. This stage is perhaps best symbolized by the following questions:

- What did you learn from all this?
- What more general meaning does this have for you?

The trainer or instructor structures this part of the experiential learning model so that participants work alone first, and then guides them into sharing conclusions with each other so that they may serve as catalysts to one another. In addition, the trainer helps to facilitate this step by:

- Asking and helping individuals to summarize what they have learned into concise statements or generalizations.

- "Pushing back" at people to help make their thinking more rigorous.

- Relating the conclusions reached and integrating them into a theoretical model.

- Making sure, within reasonable time boundaries, that everyone who wishes to share significant insights gets a chance to contribute.

- Helping the group compare and contrast different conclusions, identifying patterns where they exist, and identifying legitimate areas of disagreement.

Application

After participants have done some focused work generating generalizations, they are guided into the application stage. Drawing upon insights and conclusions they have reached during the previous phase (and other phases), participants incorporate what they have learned into their lives by developing plans for more effective behavior in the future. In an ideal educational or training event, participants would be able to apply what they have learned immediately after the workshop ends. The applications that they plan may relate to their profession, their personal life, or their student efforts, depending on the background and needs of specific participant groups.

Techniques used to facilitate the application stage include the following:

- Individual work to develop a thoughtful action plan which puts "learnings into action".
- Participants review each other's plans, and provide consultation and help as appropriate to each other.
- Some parts of individual plans might be shared with the whole group in order to create a sense of synergy.
- Participants identify other learning needs.

One of the ways the trainer assists during this process is by helping participants be as specific as possible in developing their application plans.

Conclusion

It is important to stress two other points about the experiential model. First, the exact nature of each phase of the model is driven by the goals of the training or orientation session/program. Once the goals are defined, then the session can be designed using the model as the framework. Second, theory can come in two different places – either before the experience, in which case the experience becomes a way to test the theory or try out the skills implied by it, or after, when it is interwoven into the generalization phase as participants develop their own "theory." When this is added to the "picture" of the model, it looks like this:

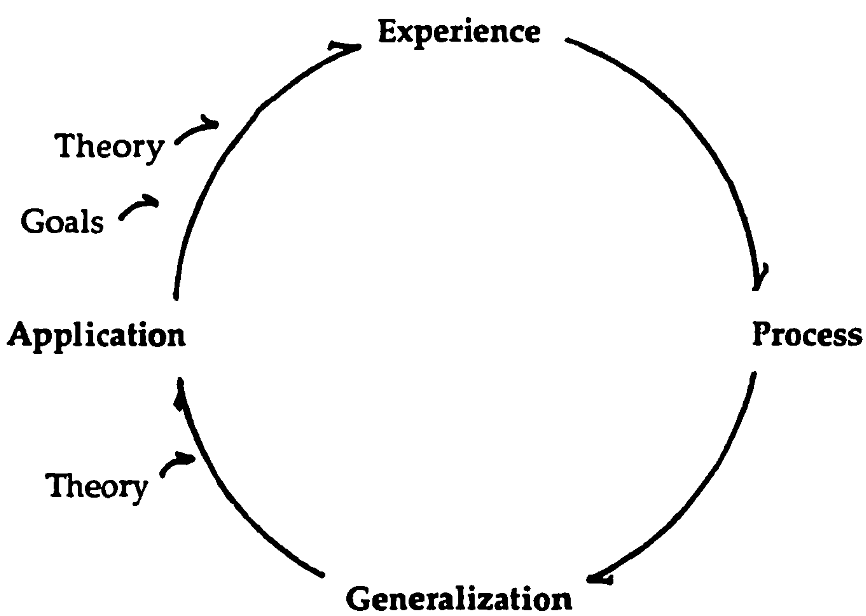

Figure 2
Adding "Theory" to the Experiential Model

In order for this model to be effective, it needs to be rigorously applied, both in the design and delivery stages. "Experiential training or learning" is a phrase often heard in the educational and training world; yet, it is frequently misused in practice where it seems to mean letting people participate in a presentation, having a question and answer session after a lecture, or a role play or case study *by itself* without the subsequent steps in the model. Most frequently, the generalizing and application stages are simply left out of the design or the program; as a result, the power of experiential learning is significantly diminished or is negated altogether.

Although the model, when correctly explained, looks very clear, the way it works out in practice is not always as clear. There are transitions between phases, and occasionally (especially if the trainer is going too fast), the group will return to a phase until it is "finished." Also, individuals in the group may not approach the learning process in such a linear fashion, and that is perfectly legitimate. The model is meant to serve as a guide for the trainer or instructor who is trying to design and carry out an educational experience for a group.

TRADITIONAL AND ADULT EDUCATION

Traditional Education	Adult Education
1. Highly effective for developing *ideas* and expanding what you *know*.	1. Highly effective for developing *skills* and expanding what you can *do*.
2. Highly effective with younger learners.	2. Highly effective with adult learners.
3. Teacher centered.	3. Learner centered.
4. Passive and theoretical.	4. Active and experiential.
5. Focused on "right" and "wrong," encourages learners to find the *one* right answer to a problem.	5. Focused on "effective" and "ineffective." Encourages learners to explore *many* approaches to determine which answer will work in which situation.
6. Measure of achievement is grades and certificates.	6. Measure of achievement is what you are able to do more effectively in your life.
7. Can foster a sense of dependence on outside experts.	7. Can foster independence and self-reliance.

JOURNAL

Adult Learning and Experiential Learning

1. **What conclusions can I draw about the way adults learn and about training styles?**

2. **What can I do in this training of trainers workshop to apply what I have learned about assumptions and styles?**

Handout 3-1A

EXTENSION AGENT ROLE PLAY SHEET

You are an extension agent from the Community Development Agency of the Ministry of Public Health. One of the communities in which you work is Koulika, where the Community Health Committee has worked very hard to prepare for the arrival of the wells and pumps. You want to begin a hygiene education program in Koulika to make sure that people in the community will keep the water from these new wells as safe as possible and make the best use of it.

You feel that it is very important to carry out a survey of current hygiene practices in the community in order to plan appropriate hygiene education activities. The committee president thinks he knows that information already, but you think this person is not in touch with many parts of the community; therefore, you do not trust the information he claims to have. You think the survey should be conducted in a very organized manner and you have specific ideas about what should be done and who should help you do it.

You want to do this survey next week, starting on Tuesday. It will take five days. On each of these days you will need two people to accompany you to translate and take notes, two to inspect households for water storage and general cleanliness practices, and two to spend time taking note of how water is being fetched and carried. You have to conduct the survey on these days because you are committed to work in another community the following week.

You are about to meet with the committee president to gain his support for the survey.

COMMITTEE PRESIDENT ROLE PLAY SHEET

You are the president of the Community Health Committee in Koulika. You and others on the committee have worked very hard to prepare for the arrival of new wells and pumps in your community. You are one of the elders in the community, and your role as president has made you very popular with other people in the community.

You have been working with a young extension agent from the Ministry of Public Health to prepare for these wells. He is well intentioned, but his suggestions always seem unnecessarily complicated. For example, before receiving approval for the new wells, he insisted on meeting not only with your committee, but with several other individuals in the community. He asked these people a lot of questions that you thought were not important. In any case, you could have given him all of the information he needed, saving everyone a lot of time and trouble.

Now this extension agent wants to start some kind of an educational program. You do not see the need to educate people about wells, since they obviously know how to use water—they have been doing it all of their lives. But you are willing to let him organize a few sessions, just to keep him happy. After all, it is important to maintain good relations with the Ministry of Public Health. However, he insists on talking to several people once again, even before he starts the educational program.

You are annoyed with this insistence and you plan to talk him out of bothering more people in the community with a bunch of questions. You would be willing to give him all the information he needs yourself, since, after all, you represent the community, and they trust you.

You are about to meet with the extension agent to discuss your views on what he wants to do to prepare for the educational program.

INDIVIDUAL AND GROUP TASK INSTRUCTIONS

Individual Task

You will soon be asked to lead a group discussion on the subject of experiential training or another topic of your choice. If you choose the topic of experiential training, ask the group about their impressions of this methodology so far, for example, its advantages and disadvantages, or some specific questions you would like answered about the experiential learning cycle. If you choose another topic, think of questions that you should ask.

Write down a list of three or four questions on the subject chosen. Then, think of what might be some possible answers and check your questions again.

As you prepare to lead this group discussion, think of how you will use your paraphrasing, questioning, and summarizing skills as well as encouragers to involve participants and manage the forward progress of the discussion.

Finally, think of how you will introduce your questions and what will be the first question you ask the group.

You have ten minutes to prepare these questions.

Small Group Task

- Practice for five minutes using all facilitation skills.
- Observer watches facilitation skills being used and the impact they have on the conversation.
- Observer keeps track of time.
- Observer shares insights and feedback for five minutes—group discusses conversation.
- Next person's turn—change roles.

INDIVIDUAL GENERALIZING AND APPLYING TASK

Think of the session on facilitation skills—paraphrasing, asking questions, summarizing, and using encouragers.

Make a list in two columns completing these sentences:

1. The most important things I have learned in this session are...	2. The ways these things apply to my work are...

FACILITATION SKILLS FOR TRAINERS AND GROUP FACILITATORS

by James A. McCaffery

Introduction

Facilitation skills are important for everyone, but are especially critical for trainers. Communication may appear to be simple, but it is one of the more complex things that human beings do. Many things can go wrong in this process. For example, we may send a message which we think is clear, while the person receiving it may not understand it in the way it was intended. Sometimes we have things on our mind, we are distracted and do not "hear" or listen very carefully.

Although the range of communication activities and the skills involved encompass most of human interchange, there are three very important facilitation skills that a trainer can learn or enhance in a relatively short time: question asking, summarizing, and paraphrasing. With continued practice one may become very adept in their use.

Question Asking

Question asking is a critical trainer skill. Questions can be asked in two ways -- as closed questions and as open-ended questions.

Closed Questions

Closed questions generally result in yes/no or other one word answers. They should only be used when you want precise, short answers. Otherwise, they inhibit discussion. The closed question can be answered with one word.

Example:

Trainer: *Do you think that recommendation will work?*

Participant: *No.*

Open-ended Questions

The open-ended question requires elaboration. "Tell me what you liked about that recommendation" seeks information. How? What? Why? are words that begin open-ended questions.

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Trainer:	*What did you like about that recommendation?*
Participant:	*I think it is a good strategy for resolving the issue, one that can be implemented without expending a lot of resources.*
Trainer:	*What kinds of goals did the group set?*
Participant:	*They set a wide range of goals. The first was...*

Summarizing

The purpose of summarizing is to:

* Pull important ideas, facts, or data together.
* Establish a basis for further discussion or to make a transition.
* Review progress.
* Check for clarity; check for agreement.

By using summarizing in a conversation, you can encourage people to be more reflective about their positions as they listen for accuracy and emphasis.

Summarizing requires you to listen carefully, in order to organize and present information systematically. Summarized information ensures that everyone in the discussion is clear about what transpired in the just-completed portion of the discussion.

For example, a trainer may summarize to ensure that participants remember what has been said or to emphasize key points made during a group discussion. In these instances summarizing is very useful. Some starter phrases to help you begin a summary are:

* *There seem to be some key ideas expressed here...*
* *If I understand you, you feel this way about the situation...*
* *I think we agree on this decision -- what we are saying is that we intend to....*

A real value of summarizing is that it gives you the opportunity to check for agreement. If people do not agree, it is better for you to know during the discussion than to find out later when a task is not completed or a deadline is missed. One of the most common complaints is that some participants think an agreement has been reached, yet things do not occur as planned afterwards. In many instances, that is because there was not really agreement during the discussion.

As an example of summarizing, assume that someone named Joan has talked for 3 or 4 minutes, and you summarize as follows:

> *Let me see if I have it straight, Joan. First, you say the work is boring, not carefully scheduled, and finally, you are concerned about the number of hours people are expected to work, correct?*

As another example, the discussion has gone on for several minutes and you summarize as follows:

> *In talking about this issue, we have come up with three main points. . .*

In summary, this communication skill is a deliberate effort on the part of a trainer to pull together the main points made by the person or persons involved in the discussion.

Paraphrasing

Paraphrasing is simply restating what the other person has said in your own words. The prefix para means along side, as in the word parallel.

The process of paraphrasing is very much like catching a ball and throwing one back -- except the ball you throw back is your own and perhaps a bit different from the original ball. Nonetheless, it is still a ball. You can throw back the other person's ideas by using such beginning phrases as:

You are saying...

In other words...

I gather that...

If I understood what you are saying...

The best way to paraphrase is to listen very intently to what the other is saying. If, while the other person is talking, we worry about what we are going to say next or are making mental evaluations and critical comments, we are not likely to hear enough of the message to paraphrase it accurately.

It is helpful to paraphrase fairly often, so that you develop a habit of doing so. You can even interrupt to do so, since people generally don't mind interruptions which communicate understanding. For example, Pardon my interruption, but let me see if I understand what you are saying...

Example:

Participant: *It seems the basic problem is that some of the people don't know how to use the management information system,*

Trainer: *In other words, you see the problem as lack of know-how.*

Another example:

Participant: *I think the most important thing is to tell the staff member clearly and directly how he is contributing to the problem.*

Trainer: *So you are saying it's important to tell the staff member directly what kind of impact he is having on the problem.*

Other Facilitation Skills

There are a number of other helpful facilitation skills, some verbal, some non-verbal. Examples are:

* Nodding one's head.
* Picking up on the last word or two of someone else's sentence.
* Repeating a sentence, or part of a sentence.
* Asking someone -- Say more about that.
* Saying -- That's good -- anybody else got anything to add?
* Maintaining eye contact, open body position.
* Saying -- Uh huh.

JOURNAL

Facilitation Skills

1. What are the most important things I have learned about facilitating a discussion?

____

____

____

____

____

____

2. What skills do I need to improve during this training of trainers workshop in order to facilitate discussions effectively?

____

____

____

____

____

____

USING SMALL GROUPS

Small groups can be used for

- building problem-solving skills to deal with a particular issue or problem (case studies, critical incidents, etc.);
- building planning skills to deal with how to approach a particular issue or opportunity (strategy development or planning);
- providing opportunities for practicing a new technique or skill (practice dyads, trios, quads, etc.);
- providing opportunities for participants to react to each other's approach, giving advice, feedback, and constructive help; and
- providing opportunities for participants to share experiences, both problems and solutions that might be helpful.

IMPACT OF LATRINES

Task

- Divide into groups of three or four people
- Discuss positive impact or benefits of latrines
- List any negative impact latrines could have
- Write your report on a flipchart
- Take 25 minutes for this task

MAKING SMALL GROUP WORK EFFECTIVE

1. Be very clear in giving task instructions to small groups. Put the instructions on a visual aid, preferably the flipchart. You may also want to put the instructions on a handout. Go over the instructions in front of the entire class; ask if they have questions.

   Decide if you want each group to make a short presentation (report outs) or if you want to lead the discussion differently. Keep the presentations brief; if they are over 10 minutes, people get weary—5 minutes is a better time frame. Then decide if you want them to put key points on the flipchart and use that in their presentation. (We recommend having them put key points on the flipchart since it records the points for referral later and helps them deliver a more focused, short presentation.)

2. Divide the total group into an appropriate number of small groups. Small groups of three to five people are desirable. Groups of over seven people begin to be unwieldy.

   The total group can self-select themselves into smaller groups, or the instructor can make the selection. You may want to be sure each small group has a balance of different participant knowledge, experience, and personal styles. If you divide the group, you should inform the group why and how you arrived at the selections. (This keeps them from trying to find a hidden agenda...this is the smart group, this is the dumb group.)

3. Provide an appropriate amount of time for the small groups to accomplish the task. There should be enough time for there to be discussion, deliberation, and decision while still encouraging them to be efficient with time.

4. The instructor should monitor the small groups unobtrusively to be sure they have understood the task, they are not having problems, or they have not gotten hopelessly entangled in another conversation or war story.

5. A few minutes before you expect them to have completed their work, go around and remind them of the time and ask if they will be ready. Encourage them to move forward.

6. Have a plan for how you want to manage having the small groups share their work with the total group. There are a number of ways of doing this.

The most common way to manage reporting out is simply to take turns, one group, then another, then another. Here are some simple ways to keep things moving:

- have people wait until the presentation has been completed before commenting;

- first ask the other group members if they have something they would like to add that their spokesperson did not say;

- then ask the total group if they have any questions of clarity (not debating their points, but questions to increase understanding of what the small group meant); and

- finally, ask for reactions from the total group.

After or during the time the total group is commenting or reacting to the small group presentation, the instructor can add comments. Ask a question or make a comment, but refrain from evaluating the presentation or the content—unless of course you say positive things.

Keep things moving along. Lots of reporting out followed by lengthy commenting can get exhausting. If you have several small groups reporting out and you expect their reports to be somewhat repetitive, it is a good idea to save comments until the end and comment on all reports. Stop after point three above and go on to the next small group.

7. After all groups have reported out, lead a summary discussion of all the ideas that have been presented. You might explore similarities and differences; you might ask people to talk about what they think is or will be the most difficult idea to implement; you might ask what they heard that struck them as especially creative; or you might explore a disagreement more fully.

8. A good way to end the discussions is to use the generalizing and application part of the experiential learning cycle. Ask the question(s)...What conclusions are we reaching about...? What are we learning about...?

   Move to the application phase by asking...When/if this happens to you, what is one thing you will remember to do? In order to keep this from happening to you, what are three things you can do? How can you adapt what we have been discussing here today to your own situation?

USING SUCCESS ANALYSIS

You and the communities you work with both have to judge how well your work is going. You should not wait until you have finished a project to look at what has happened. It is better to look at what is happening on a regular basis, such as every week or every month. You need to know what you have done well, what mistakes have occurred, and what problems need to be solved.

Success analysis is a helpful way of reviewing and evaluating what you have been doing on a regular basis. Success analysis looks at your successes, not just your failures. It reviews the problems that came up and how you overcame them. It looks at what problems remain and how you might overcome these too. To use success analysis, you or the community members should ask yourselves these questions:

- What have we done that was successful? Why were we successful?
- What problems did we meet? How did we overcome these problems?
- What problems still remain? What have we learned that can help us plan to overcome them too?

Success analysis can be done

- Every day after work
- At the end of every meeting of a community organization
- At the end of every general community meeting
- At the end of every step in the project development cycle
- At regular times when carrying out a project (such as after each step)
- Whenever major problems come up
- At the end of a project
- At regular times (monthly, quarterly, annually)

Task

- **Divide into groups of three or four people**
- **Discuss the kinds of problems that might arise in promoting a community's use of success analysis**
- **Identify two or three of the most common problems**
- **List ways to avoid or solve these problems**
- **Be prepared to report out orally**
- **Take 25 minutes for this task**

JOURNAL

Small Group Tasks

1. What are some of the most important things to remember about

   a. preparing small group tasks?

   b. managing small group tasks?

2. What do I need to focus on in order to improve the way I prepare and manage small group tasks?

GUIDELINES FOR GIVING FEEDBACK

- Make specific statements; support general statements with specific examples.
- Use descriptive rather than judgmental language.
- Be direct, clear, and to the point.
- Focus on behavior that the receiver can do something about.
- Remember that feedback is more effective when it is solicited rather than imposed.
- Remember also that effective feedback is well timed.
- Take into account the needs of the receiver of feedback, as well as your own.
- Plan how you will give feedback.

HELPING OTHERS GIVE FEEDBACK

- Solicit feedback in clear and specific areas.
- Make it a point to understand the feedback; paraphrase major points; ask clarifying questions.
- Help the giver use the criteria for giving useful feedback.
- Avoid making it more difficult for the giver of feedback than it already is.
- Avoid explanations of "why I did that," unless asked.
- Show appreciation for the effort it took for the other person to give you feedback.
- Using key points, say what you intend to do as a result of the feedback.
- Remember that feedback is one person's perceptions of another's actions, not universal truth.

FEEDBACK SITUATION 1: AHMED

You are Ahmed, an extension agent for the Health Education Division of the Ministry of Health (MOH). You have been on the job for a year. Mohamed, your supervisor, is the District Health Officer. He has asked you to report to his office.

1. You have spent most of your first year on the job moving into your town and building relationships with key community members. You have also been spending a great deal of time establishing contacts with key people in the MOH, especially the Division Director for Health Education, whom you consider very influential.

2. You think that your building relationships with community people and ministry officials has been successful, although the process seemed slow and frustrating at times.

3. You were assigned to work in six communities, each of which has a new health committee, but you have only been able to focus on the one in your community. The reasons for this are the difficulties in getting gas from the ministry, the Division Director's strong interest in your community, and your community's high visibility (on the main road).

4. The health committee in your town had some trouble getting started this year because the materials for latrine construction, such as slabs, that you had convinced the people to try were late in arriving. In fact you had to use some of your own money to travel to the capital to pick up the slabs. Even then, you had to spend many more days there than you had planned due to shortages of latrine slabs in the MOH warehouse.

FEEDBACK SITUATION 1: MOHAMED

You are Mohamed, a District Health Officer for the Ministry of Health. Ahmed, the health education extension agent, has been on his job about a year now, and you are planning to have a serious talk with him about his work and the success of his projects. You know the following things about Ahmed:

1. Generally, Ahmed is a good worker. He spends a lot of time in the field, and seems quite committed to his projects. He works well with both you and his co-workers.

2. Ahmed has had a good deal of trouble getting the health committees going this year. He seemed to spend a good deal of time with one committee, which resulted in the neglect of the other five to which he was assigned.

3. The health committee that Ahmed devoted so much time to really never got going. They had difficulty getting latrine slabs, but you are concerned with the role Ahmed played in this committee. He sometimes has trouble being the consultant to the committee—he tends to take on too much of the responsibility himself.

4. You think Ahmed may have been influenced because the community where he worked so much was the village of the Division Director for Health Education. You think Ahmed is very young and inexperienced.

Handout 5-2C

FEEDBACK SITUATION 2: THE DIVISION DIRECTOR

You are the Division Director for Health Education in the Ministry of Health. You are about to have a serious conversation with one of the district health officers, Mohamed, about his work and the projects in his area. The following things are on your mind:

1. Ahmed, one of the health education extension agents who works in Mohamed's district, has just quit. This is the fourth agent out of 18 in Mohamed's district that has quit recently, all within their first year on the job.

2. Mohamed's behavior in meetings in the ministry offices is supportive, active; he focuses on key issues, listens well, and responds actively to you and other staff members. He works hard and goes out of his way to assume additional responsibility. For example, he did an excellent job recently during the annual budget process.

3. Ahmed, the extension agent, talked to you before leaving his job. He said one of the reasons he was quitting was that he did not get adequate support from Mohamed. He did not think Mohamed really cared because he did not help him get the latrine slabs he needed. Ahmed said Mohamed kept talking about the necessity of building the skills of the community health committee members to run their own health education program. Ahmed thought that was fine, but first you had to get a health education program established, and to expect community members to take on major responsibilities at this early stage was ridiculous because they were not fully convinced of the effectiveness of health education activities.

4. Mohamed had been somewhat loud and argumentative at two recent official functions.

5. Mohamed has not filled out any travel vouchers for the past six months, and the people in the administrative unit are upset.

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Handout 5-2D

FEEDBACK SITUATION 2: MOHAMED

You are Mohamed, a district officer for the Ministry of Health. You have been working with the Division Director for Health Education for six months now. These are the things that concern you:

1. You maintain good relations with your Director. He generally gives you adequate responsibility and authority to carry out your job. You think that you communicate clearly to him and in a timely way about the issues affecting your district.

2. You believe the agents should stay in the field as much as possible, and that they should build co-equal relationships with community members. You do not think the Director stresses the consultative role of the extension agent enough. Instead, he subtly encourages agents to play the role of expert, the one who has all the answers and is going to set up the health education program for the communities.

3. One of your agents, Ahmed, during the past year spent nearly all his time on one community health committee, neglecting the other five to which he had been assigned. The one he spent so much time on was the village where the Division Director was born and raised. You know he talked to Ahmed from time to time, and you think he influenced Ahmed to spend nearly all his time with that one health committee.

4. Although you have little patience for administrative details such as travel vouchers and other paperwork, you think that your performance is quite good. You are concerned that the Division Director may not share this perception because you have not been promoted in several years.

JOURNAL

Feedback Skills

1. What have I learned about giving and helping others give feedback?

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2. What do I need to focus on during this training of trainers workshop in order to improve the way I give and help others give feedback?

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Handout 6-1

DEMONSTRATION CASE STUDY

Objective: To describe at least two strategies for justifying the use of experiential training methods.

You are the manager of the Ministry of Rural Development's Training Office.

Extension agents in the Ministry have been asking for a special course in the latest techniques in pump maintenance. The Division of Research has been doing a lot of research in this area, but they do not seem interested in allowing their materials to be used in training. Last week they finally agreed to provide "lecturers" for the course.

You have two staff trainers, Tom and William, assigned to the course. They have just come into your office because they have a disagreement. Tom says that planning a course that uses only "lecturers" will be boring, and that some "experiential" training must be included. William, on the other hand, says that the Division of Research will not help them with the course if the training officer wants to change the lecture format. Tom believes that it is better not to do the course if they must only use the lecture approach.

Your boss has been pressuring you to provide this course. What should you do?

Discussion Questions

1. How would you describe this problem?

2. What would you do as the manager of the training office?

3. What could you have done to avoid this problem before it occurred?

CASE STUDY: THE INTERRELATIONSHIP BETWEEN WATER AND HEALTH

Objective:

After examining this case study, the participants will be able to

1. identify ways that water can become contaminated, and

2. describe the health effects on community members of consuming unsafe water, coming into contact with unsafe water, and insufficient water.

Case Study:

Many years ago, two communities, Wambila and Amaru, were established on the banks of a small river by people of similar ethnic background. Each has about 500 inhabitants, who are mostly farmers. However, the fate of these two communities has been quite different.

At first, both used the river for all their water needs: drinking, bathing, washing clothes, etc. As the communities grew larger, the water from the river wasn't enough, especially during the dry season, when it gets low. Wambila dug two open wells where women can get water during the rainy season. Amaru decided to join a government program for drilled wells. It cost them much money, but they have two handpumps that never go dry. They also reinforced the sides of an old dug well, and added a cover and pulley for the buckets.

Wambila's dug wells have no covers so the rains can fill them up. Sometimes the sides collapse after heavy rains and ground runoff fills them up. When they go dry, the women must walk many miles into the hills to find buckets of muddy water from where the river still flows. When they get home, they use this little bit of water to drink, cook meals, and wash vegetables, clothes, and dishes. There is so little water that the children do not get bathed very often. In this season they have itchy skin and bald patches on their heads. Their mothers are too tired to wash the children and do all the other chores, too. Water is so scarce, even adults don't bathe very often. Still, they are grateful for even the muddy water they keep in open jars by the doorway.

During the wet season, everyone bathes in the river and drinks the water from the open wells. Sometimes the boys who play in the river have blood in their urine. Wambila has no latrines. Adults defecate in the bushes near the river, and children use the garbage dump nearby. The children have diarrhea frequently during the rainy season. Many of them die following bouts of diarrhea. Their tummies are round, and often full of worms. Bellyaches are a problem for adults, too, and everyone seems to come down with fever.

Ever since Amaru installed the pumps, the people have noticed that children don't have much diarrhea and they eat better and learn better in school. They decided only to use the river to wash clothes, not to drink or bathe. This year, several families have begun to construct latrines with the help of a community development worker, who also showed them how to bury garbage outside the community in a pit. The adults have told the community worker how the bellyaches and fevers have improved since the pumps were installed. The women have started vegetable gardens using the runoff from the pumps, and they sell the produce in the market for some extra income. Sometimes they talk about how tired they used to be walking so far for water.

<u>Questions</u>:

1. What kinds of water supply systems do Wambila nd Amaru have? Which ones are safe and unsafe? Why?

2. What kinds of sanitation systems do Wambila and Amaru have? Which ones are adequate and inadequate? Why?

3. Using the case study and other examples, what are ways that water can become contaminated?

4. What are the health effects of

   (a) consuming unsafe water?
   (b) coming into contact with unsafe water?
   (c) insufficient water?

5. What is the role of women in water- and hygiene-related activities in Wambila and Amaru?

TRAINERS' GUIDE TO CASE STUDY QUESTIONS

Questions:

1. **What kinds of water supply systems do Wambila and Amaru have? Which ones are safe and unsafe? Why?**

   [*Both: The river. Unsafe because most surface water is considered unfit for drinking.*

   Wambila: Two open wells. Unsafe because uncovered and unprotected.

   Amaru: Drilled wells with handpumps, covered dug well with pulley. Safe because covered and protected.]

2. **What kinds of sanitation systems do Wambila and Amaru have? Which ones are adequnte and inadequate? Why?**

   [*Wambila has no excreta disposal system, and people dump garbage near their homes. Inadequate.*

   Amaru has some latrines, a good garbage disposal system outside the town. Better than Wambila, but until all families have latrines, it will not be considered fully adequate.]

3. **Using the case study and other examples, what are ways that water can become contaminated?**

   [*—Fecal matter washed into unprotected source;*
   —Dirty buckets or other containers used to collect water;
   —Unprotected, uncovered storage jars in homes;
   —People, especially children, urinate in river;
   —Animals in and around water sources;
   —Baby feces in courtyard getting into stored water;
   —Garbage near river.]

4. What are the health effects of

(a) consuming unsafe water?

[*diarrhea, bellyaches, worms, fevers/infections*]

(b) coming into contact with unsafe water?

[*blood in urine or schistosomiasis*]

(c) insufficient water?

[*skin problems, ringworm (scalp patches), fungus, skin infections; secondary effects on women and children from exhaustion and undernutrition*]

5. What is the role of women in water- and hygiene-related activities in Wambila and Amaru?

[*—fetching water*
—water storage
—laundry
—washing food
—preparing food
—washing babies and children]

PURPOSE AND CHARACTERISTICS OF A CASE STUDY

Purpose

- Identify problems and develop insight to solve them
- Practice analyzing situations
- Try out new strategies
- Appreciate a problem (gain awareness)
- Sift through information
- Improve perceptions, forecast possible plans of action

Characteristics

- Contains a problem to solve; raises questions
- Has an objective or purpose
- Is precise, concise, and systematic
- Contains sufficient background data
- Captures reader's attention
- Checks for understanding of objectives
- Is realistic
- May be based on actual experiences but not be traceable to specific people
- Allows participants to identify with the case
- Does not have obvious solutions or answers present in the text
- Is open ended

- **Contains study questions that are linked to the objective(s)**
- **Follows a logical sequence**
- **Includes a number of characters (fictitious people)**

Handout 6-4

DELIVERY PLAN FOR A CASE STUDY

1. Greet/relax participants

2. Present objectives on flipchart (check understanding)

3. Explain procedures on flipchart (set times)

4. Divide people into groups; introduce and distribute case

5. Give people time to read case—be available for questions

6. Keep track of time

7. Process:

   - Ask for group reports

   - Ask people what they think about the case and the experience of analyzing it

CASE STUDY:

LATRINE HYGIENE IN KABORA

Objectives: To develop some strategies for resolving hygiene education program implementation problems.

To identify the proper role of the hygiene educator in program planning and implementation.

Sally is a hygiene educator who is responsible for activities in the community of Kabora. Kabora is participating in a big water supply and sanitation program, and has received two new, drilled wells with handpumps. Also, many families have signed up for latrine construction, and to date, about half the compounds have latrines. The mobilization of the community and the organization of the work have come from the Community Health Committee (CHC), led by its president, Alice, and helped by Sally.

To start off their hygiene education activities, CHC conducted a survey of health habits in Kabora, and found that people wanted latrines more for status symbols than for hygiene and health reasons. Once the latrines were built, they were used and maintained only haphazardly. Children were permitted to defecate anywhere, even in the courtyard. Very few people washed their hands after defecating or before eating. CHC decided to organize a variety of educational activities in order to get people to keep their latrines clean, to encourage children to use them, and to get everyone to wash their hands after using the latrines.

During a recent planning meeting, they discussed all the possible actions, including campaigns at the primary school and at the Maternal and Child Health (MCH) clinic, periodic inspections of the latrines and handwashing habits, and home visits for educational sessions with families who have latrines. Most of these activities would be carried out by the committee members after Sally had trained them in hygiene education techniques.

When Sally had conducted the training for CHC, she felt that they could proceed on their own and that she could concentrate on other communities. Alice went off to the school to propose a latrine hygiene campaign to the headmaster. He said he would discuss it with the teachers, but in fact was not pleased that CHC thought his school had a hygiene problem, especially because they had worked so hard to construct the latrines. Two other CHC members went to the MCH clinic to offer to conduct hygiene education sessions for mothers in the waiting room. The clinic staff thanked them and explained that they held their own sessions regularly.

Since Sally was not scheduled to come back for several months, the committee postponed meeting again and the members went off to do different parts of the hygiene education plan they developed. Two members went on home visits to families with latrines. After visiting a few families, they discovered that other CHC members had already been there. They went to see Alice to ask her to schedule people's home visits so there would not be any duplication. Alice said she would call a meeting, but that for the next few weeks, she was too busy. Shortly thereafter, she received a visit from several of the families who wanted to know why CHC members had been coming to inspect their latrines and to ask them questions about when they use soap and water to wash their hands. They felt they should have been informed beforehand or asked permission.

Alice called a CHC meeting and soon the members were accusing each other of duplicating efforts and blaming Alice for not organizing the work. Alice was very unhappy about the situation, and decided to explain all these problems to Sally. The next time Sally came to Kabora, Alice told her she wanted to resign from her position as CHC president. Sally tried to persuade her not to quit and offered to help her get the hygiene education campaign off to a new start.

Discussion Questions

1. What problems related to program implementation occur in this case study?

2. How could these problems have been avoided in the first place?

3. How should these problems be solved?

4. What specifically should the role of the hygiene educator be in program planning and implementation?

TRAINERS' GUIDE TO CASE STUDY QUESTIONS

1. **What problems relating to implementing a program occur in this case study?**

   [— School officials and clinic staff reacted unfavorably to CHC plans for hygiene campaigns and probably won't cooperate;

   — CHC members duplicated each others' efforts;

   — Families reacted negatively and complained about CHC member home visits;

   — CHC members began squabbling and accusing each other.]

2. **How could these problems have been avoided in the first place?**

   [— Schools and clinics could have membership in the CHC; at the very least they should have been invited to participate in campaign planning;

   — Better and clearer workplans, more effective supervision;

   — CHC should have held informational community meetings before carrying out home visits; families should have agreed to participate;

   — Sally should have supported Alice and generally guided and supervised the activities of the CHC.]

3. **How should these problems be solved?**

   [— Replan the campaign with the participation of the school and clinic;

   — Revise the workplan to clarify CHC members' tasks and the time frame and specify who supervises these tasks;

   — Hold a communitywide meeting to explain the campaign to everyone and to get agreement and support from the community;

   — Sally's role as facilitator of the CHC's actions should be strengthened and improved.]

4. **What specifically should Sally's role have been in program planning and implementation?**

   [She should have helped the group to be clearer about their workplan. She should have been an active supervisor and helped Alice to do her job of president well by holding meetings, discussing problems as they arose, and being present during the campaign start-up.]

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Case Study Delivery

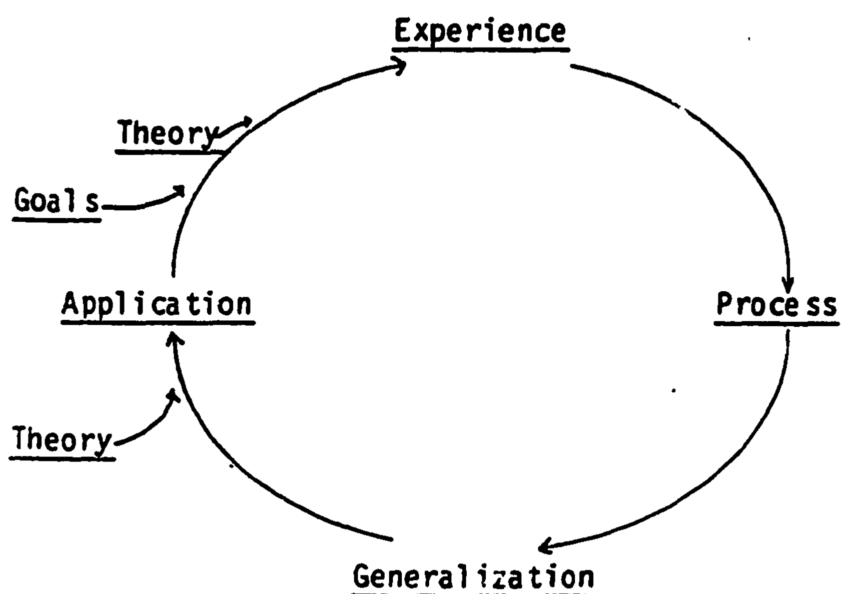
1. What are the most important things I have learned about delivering a case study?

2. How can I use case studies appropriately in my training programs—what are some specific opportunities that I can think of in the next few months?

SEVEN-STEP MODEL

DESIGN COMPONENTS OF AN EXPERIENTIAL TRAINING SESSION*

Before we begin to design a training session we should recall the basic principles of the experiential learning model. First, the application of each phase of the model is driven by the goals of the training session. Once the goals are defined, the session can be designed using the model as the framework. Second, theory can be inserted in two different places—either before the experience, in which case the experience becomes a way to test the theory or try out the skills implied by it—or after, when it is interwoven into the generalization phase as participants develop their own "theory."



Oftentimes the model is misused in practice where certain components are left out of the design or the program. As a result, the power of experiential learning is significantly diminished or is negated altogether. However, when the seven components are applied rigorously in sequence, the potential for effective experiential learning can be dramatic.

In order to ensure a clear understanding of the experiential learning model, it is important to define the design components individually.

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*Wilma J. Gormley and James A. McCaffery, Ph.D. *Design Components of an Experiential Training Session*, Training Resources Group, 1982.

1. CLIMATE SETTING

- Stimulates interest, curiosity, and enables the participants to begin thinking about the subject at hand.

- Provides rationale for why the subject is important to the participants and how it will be useful to them.

- Links this training session to previous ones and places it into the overall framework of the workshop.

2. GOAL CLARIFICATION

- Presents statements to the participants which describe the intent, aim, or purpose of the training activity.

- Provides an opportunity for participants to get a clear understanding of the goals of the session, and allows them to explore additional issues or raise concerns.

3. EXPERIENCE

- An activity in which the group engages that will provide an opportunity for them to "experience" a situation relevant to the goals of the training session.

- This "experience" becomes the data producing event from which participants can extract and analyze as they complete the learning cycle.

- Common "experiences" are role plays, case studies, self-diagnostic instruments, games, simulations, etc.

4. PROCESSING

- Participants share individual experiences and their reactions to the experience.

- The group analyzes and thoughtfully reflects on the experience.

- The trainer guides and manages the processing of information.

5. GENERALIZING

- Participants determine how the patterns that evolved during the experience phase of the learning cycle relate to the experiences of everyday life.

- Participants seek to identify key generalizations that could be derived from the experience.

6. APPLYING

- Using the insights and conclusions gained from the previous steps, the participants identify and share how they plan to use these new insights in their everyday life.

- Participants answer the questions, "Now what?" and "How can I use what I learned?"

7. CLOSURE

- The events of the training session are briefly summarized.

- Provides a link to the original goals of the session and seeks to determine if the goals have been met.

- Wraps up the training session and gives a sense of completion.

- Provides an opportunity to link the session to the rest of the program, especially the next training activity.

Handout 7-2

JOURNAL

Session Design Framework

1. What are the most important things I have learned about designing a session?

2. What are some specific opportunities I can think about in the next few months to redesign some of my training programs?

THE INTERACTIVE LECTURETTE

WHAT IT IS...

- Short, concise
- Followed by questions
- Made up of key points
- A "small" lecture
- Supplemented by visual aids or handouts
- A building block to an activity that follows (small group task, case study, etc.) or an activity that precedes it

LEARNING PURPOSES

- Is designed for participants who have some previous knowledge
- Serves as a preamble to another activity
- Provides "grist" for a large group
- Can be used for knowledge objective
- Can be used to introduce new theories

PARTS OF A LECTURETTE

- Introductory questions
- Main (key) points
- Summary

WHAT YOU NEED TO THINK ABOUT

<u>Before</u>

- How lecturette fits with overall session objective
- Visual aids
- Participants' level of knowledge
- Time of day

<u>During</u>

- Making smooth transitions
- Introductory questious
- Main points
- Summaries (check for understanding)

TIPS

- Stop to elicit input
- Summarize frequently
- Use concrete examples
- Employ humor
- Ask questions

7.20

USING VISUAL AIDS

A lecturette is verbal, yet any group facilitator who has lectured and obtained feedback knows that participants want to see the key points of the lecturette, even if this involves no more than a summary outline on a flipchart.

The great variety of such aids can be divided into three basic groups, defined by the level of technical sophistication required to use them:

- At the most basic level are newsprint charts and chalkboard.
- The mid-level includes overhead projectors and handouts.
- The "advanced" level comprises slides, films, and video recordings.

Most facilitators will use the technologically sophisticated aids only rarely. They are better reserved for the detailed presentation of information. Videotape can be particularly difficult. Its effective use requires considerable skill when group participants are not themselves being taped. With both videotape and film, one precaution must be kept constantly in mind: because this equipment requires technical familiarity for correct operation, as well as set-up time, everything must be prepared in advance. Slides are easier to use, but have even more limited utility.

The overhead projector and handouts, at the mid-level of visual aid technology, can both be most effective for the presentation of tables of data and of complex charts and diagrams. For the most complex tables, an overhead projector is best, since the facilitator can point to the items being examined. For complex diagrams, on the other hand, handouts are better since participants will not have to try to copy the diagram while listening to the lecturette. Little needs to be said about the technical operation as almost everyone knows how to operate an overhead projector. Handouts can also provide simple, brief summaries of the content of a presentation that can be consulted during the lecturette, thus giving a clear structure to the talk.

Finally, on the most basic level, are the group facilitator's "old standbys"—flipcharts and chalkboards. It should be obvious (yet experience shows it is not) that participants should not be forced to decipher illegible handwriting. The simple way around this failing is to prepare charts in advance. (In extreme cases a friend or an associate can do the writing.) A second major point for the facilitator to remember is to summarize and to emphasize key words; the reason for the written presentation is to provide emphasis or to give an outline.

SAMPLE LECTURETTE OUTLINE

Defining the Interrelationship

Ask questions about the interrelationship between water and health modeled on those listed below. When participants respond, write some of their answers down on a flipchart.

- **How can water make you sick?**

Possible answers:

1. by consuming contaminated water
2. by swimming/bathing/standing in contaminated water
3. by being near contaminated water
4. by not using enough water

- **How can consuming water improve your health?**

Possible answers: By consuming—

1. safe water we can avoid water-borne diseases
2. plenty of water we can avoid dehydration
3. plenty of water we can treat diarrhea, fever, minor urinary infections, coughs, constipation, etc.

- **How can using water improve your health?**

Possible answers: By using plenty of water for—

1. bathing we can avoid skin and eye infections, and diseases carried by fleas, lice, mites or ticks
2. washing hands after defecation, after working or handling dirty things and by washing food and utensils we can avoid stomach pains, diarrhea, vomiting, and fevers caused by worms or parasites
3. cleaning latrines, homes and public facilities (schools, health centers) we can avoid many health problems already mentioned

This lecturette introduces the case study on *<u>Handout 6-2: The Interrelationship between Water and Health</u>*.

SAMPLE LECTURETTE OUTLINE

<u>Implementation Problems</u>

Ask participants, based on their own experience, for some examples of problems that arise during the implementation of a project.

Build on their responses by pointing out that many of the problems could have been solved by careful supervision of the activities by the designated members of the community group or by the hygiene educator.

Ask what the function of supervision should be: to ensure that elements of a plan are happening when they should be; to provide support to those who are carrying out tasks; to coordinate various activities; to resolve problems as they arise before they become obstacles to successful completion of a job.

Ask the group what some tasks are that a supervisor would carry out. These might include:

- Visiting people while they are working
- Providing positive feedback and suggestions for improvement
- Holding group meetings to discuss progress and problems
- Helping to identify and resolve problems quickly
- Encouraging those carrying out tasks

This lecturette introduces the case study in <u>*Handout 6-5: Latrine Hygiene in Kabora*</u>.

SAMPLE LECTURETTE OUTLINE

Discussion of Disease Cycles

Distribute the attached sheet entitled The Life Cycle of Schistosoma and briefly review each step in the cycle. Ask the participants to give a description of the cycle for each of three local diseases. Diseases discussed should have different methods of transmission (for example, schistosomiasis, tapeworm, hookworm, malaria, or cholera).

Control of Excreta-Related Diseases

After each disease cycle is drawn ask participants what are the appropriate methods of blocking the disease cycle to prevent transmission and excreta-related diseases. For example with schistosomiasis:

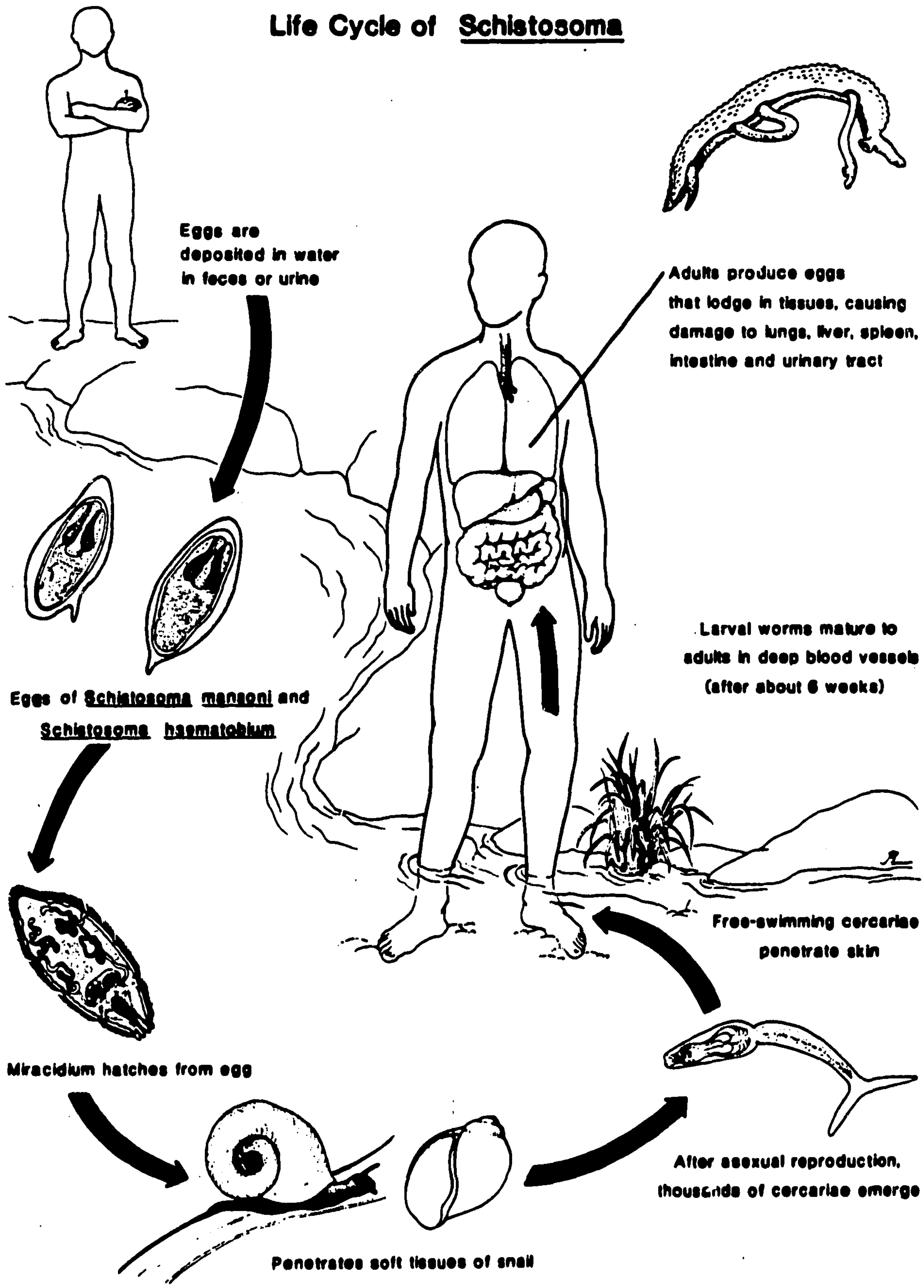
- Excreta can be isolated from surface water by use of latrines
- Provide a clean source of water for drinking, bathing, and washing dishes and clothes
- Destroy snail vectors
- Treat infected individual with medicine which kills the schistosome worms

Ask how effective improved excreta disposal will be by itself in preventing each disease discussed.

Summarize that participants should now have a general understanding how excreta-related diseases are spread and controlled. Mention that sanitation is only one method of controlling disease and that there are often several routes of transmission of disease. Thus, improved sanitation is only effective in improving the community health when coupled with other programs designed to provide adequate housing, water supplies, health care, education, nutrition, and vaccinations.

This lecturette introduces the small group task in Handout 4-2: Impact of Latrines.

Life Cycle of Schistosoma



Source: VBC Project, 1990.
Tropical Diseases in the Developing World.

PREPARING AND PRESENTING A DEMONSTRATION

1. Decide what it is that you want your audience to understand—to learn how to do. (Your goals!)

2. Gather and study information about the practice you want to demonstrate.

3. Write out step-by-step notes on how you will deliver the demonstration, and important points you will make with each step.

4. Prepare in advance all required materials, and test all tools and equipment to be sure that everything works properly.

5. Practice the demonstration until it is easy for you.

POINTS FOR GIVING DEMONSTRATIONS

1. Introduce yourself, and ask the audience what they already know about the topic.

2. Ask if they've ever seen a demonstration on this same topic....where, and under what circumstances.

3. Use their comments to lead into what you are going to do, and why this topic is of interest to you.

4. Explain and show, slowly and carefully, each new practice step-by-step.

5. Stop to answer questions and <u>ask the group questions</u>.

6. Repeat difficult steps.

7. Ask people in the group to help you with the demonstration.

8. When you finish, ask members of the group to do one or more of the steps to check how well the audience understood the demonstration, and to give individuals a chance to practice.

9. **End the demonstration by asking the audience to tell you what they learned from the demonstration.**

10. **Summarize important points.**

SAMPLE DEMONSTRATION

"Keeping Water Safe"

Objective: At the end of this demonstration, participants will be able to show at least three ways to keep water safe once it is in the home.

Materials Needed:
- — container commonly used to store water in the home
- — clean water from the improved source
- — cup or dipper
- — piece of string
- — tray or other locally available item that can serve as a cover for the water container (preferably with a handle where the string and dipper can be attached)
- — soap powder and brush (or similar items) to scrub out container
- — small amount of bleach (eau de javel)

1. <u>Introduction</u>

a. Describe what you will be doing with the group.

- **Demonstrate a few simple ways to keep safe water safe once it is in the home.**

b. Ask the group a few questions related to the subject, such as

- **What is the difference between safe and unsafe water?**

  [Safe water has nothing in it that can make us sick when we drink it.]

- **Where does safe water come from?**

  [protected, improved water source such as a pump, covered well, boxed spring, or a cistern]

- **Once the water comes out of the clean source, how can it become unsafe?**

  [dirty containers, dirty area around the source, things fall into it at home, dirty dippers are used, and so on]

2. Demonstration

a. **Ask the group what specific things they know of that can be done to protect safe water once it is in the home.**

b. **Show the group how to scrub out the drinking water container once a week with soap powder and a locally available scrubber (brush, natural fibers, etc.) and rinse it well.**

c. **Fill the container with clean water and add a few drops of bleach to completely disinfect it.**

d. **Show the group how to cover a water jar with a clean metal tray or other appropriate lid. Ask them for other ideas for covering water containers.**

e. **Show the group how to attach a dipper to the lid or to the handles of the container with string so it does not fall on the ground. Ask them for other ideas on keeping the dipper clean.**

f. **Ask for a volunteer participant to come up and demonstrate cleaning the container, filling it with clean water and disinfecting it, covering it with a lid, and attaching a dipper with string. The volunteer should describe each action as he or she does it.**

3. Conclusion

a. **Ask participants what main points to keep in mind about keeping water safe in the home.**

[clean drinking water containers, cover with lid, use clean dippers]

b. **Ask the group what they will do when they get home to ensure that their water supply remains safe.**

SESSION PREPARATION TASK

- Write the session plan in your own words, identifying the time needed for each step, for a total of 45 minutes maximum.
- Be prepared to display and explain the training event from which this session is drawn, and where the session fits in the overall plan.
- Decide who will do each step (one person may do the first two steps, the other the third and fourth—or they could alternate at each step).
- At each step, agree on the role and place of the person not taking the lead (sitting at the side, helping with flipcharts, etc.).
- The lead person for each step prepares the necessary flipcharts and handouts.
- The lead person for each step rehearses on his/her own, then with the other presenter.
- You have one hour and 30 minutes for this task.

Training Of Trainers

Observer's Checklist

Name of Participant: ____________________
Today's Date: ____________________

	4 Effective	3 Do Less	2 Do More	1 Not Done
1. CLIMATE SETTER				
a. Greets, puts people at ease	____	____	____	____
b. Asks questions related to subject	____	____	____	____
c. Asks particular question(s) that draws on their experience related to subject	____	____	____	____

Comments:

	4 Effective	3 Do Less	2 Do More	1 Not Done
2. OBJECTIVES				
a. Written and legible	____	____	____	____
b. Clearly explained	____	____	____	____
c. Action verbs	____	____	____	____
d. Measurable, observable	____	____	____	____

Comments:

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	4 Effective	3 Do Less	2 Do More	1 Not Done
3. EXPERIENCE (Circle: case study, role play, demonstration, small group task, other....)				
a. Technique(s) selected appropriate	____	____	____	____
b. Content presented clearly	____	____	____	____
c. Follows appropriate delivery sequence	____	____	____	____
d. Paraphrases/summarizes participants responses	____	____	____	____

Comments:

	4 Effective	3 Do Less	2 Do More	1 Not Done
4. PROCESSING				
a. Questions elicit participants reactions (thoughts & feelings) about experience.	____	____	____	____
b. Asks open-ended questions	____	____	____	____
c. Follows appropriate processing sequence	____	____	____	____
d. Paraphrases/summarizes participants responses	____	____	____	____

Comments:

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	4 Effective	3 Do Less	2 Do More	1 Not Done
5. GENERALIZING				
a. Asks questions linked to session objectives	____	____	____	____
b. Asks open ended questions	____	____	____	____
c. Writes the participants' answers	____	____	____	____
d. Paraphrases/summarizes participants' learnings	____	____	____	____

Comments:

	4 Effective	3 Do Less	2 Do More	1 Not Done
6. APPLYING				
a. Asks questions that encourage participants to apply learnings in back home situation	____	____	____	____
b. Asks open ended questions	____	____	____	____
c. Solicits examples & encourages back home use	____	____	____	____

Comments:

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	4 Effective	3 Do Less	2 Do More	1 Not Done
7. CLOSING				
a. Summarizes main points/learnings	____	____	____	____
b. Reviews objectives	____	____	____	____
c. Concludes, bridges to next session	____	____	____	____

Comments:

____
Total Time

Comments on Overall Session:

Name of Observer: ______________________ Signature: ______________________

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JOURNAL

Practice Training Round One

1. What are the most important things I want to remember about the seven steps of a session design and its delivery?

2. What will I do differently in Round Two of Practice Training? (list some specific areas of improvement)

JOURNAL

Field Exercises

1. **What are the most important things I want to remember about planning and carrying out a field exercise?**

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2. **What must I remember to do when organizing field exercises back at work?**

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DEMONSTRATION ROLE PLAY

The following role descriptions are for use in the demonstration role play. They are good examples of how a role should be written for use in training sessions.

Role Description A:

MUNI

As the director of the ministry's Educational Training Center, you have been encouraging your five trainers to use a more experiential model in their training. Three of the trainers are very excited about the new methods and are using them in their training sessions. The other two are not in disagreement with the new methods, but you have noticed that they still use the lecture method as their only way of instructing.

Because you want all of your staff to use the same experiential methods, you have decided to have a meeting with one of the two, Abdi, this morning. You are also concerned since you have conducted several training sessions with Abdi and the others on how they can use this new approach, but Abdi is still not using it.

Role Description B:

ABDI

You have been a trainer in the ministry's Educational Training Center for several years. Your courses have always been popular, and your performance appraisals have been excellent. During the past several months (after returning from a training course in the U.S.) your director, Muni, has been asking you to use a more participatory, interactive approach in your courses. He has worked with you and the other trainers on how this could be done. And you have tried. You are open to the new methods, and you have used them, but it simply is not working! First, it is very time consuming, and you are falling behind in covering the necessary content. Second, the students consider the new methods games. They clearly prefer the lecture method.

Muni has asked you to come to his office to discuss how you are doing with this new methodology. You are glad to have this opportunity to tell him your concerns.

DELIVERY PLAN FOR A ROLE PLAY

STEP	TYPICAL ACTIVITY
1. Climate Setting	Short story; statement about topic area.
2. Goals	Explain goals and clarify.
3. Experience	
A. Describe the situation	Tell about the characters, who they are, and what they will be doing; where, why, other background information.
B. Select the role players	Ask for volunteers or select.
C. Give task to observers	Assign something that observers look for during role play.
D. Brief the role players	Work with each role player separately to make sure he/she understands the role. Do not teli them what to say or do.
E. Set the stage	Remind everyone of the situation and set up the furniture.
F. Begin the role play	Let role play run for approximately five minutes.
4. Processing	— Thank the role players — Keep role players up front — First ask group: "What strategy did _____ use?" — Then ask role players: "How well did your strategy work?" (de-role)
5. Generalizing	Ask participants and role players what they learned from the role play and processing discussion. Record their responses on a flipchart.
6. Applying	Ask participants and role players how they intend to use their learning/insights about the role play. Record their responses on a flipchart.

ROLE PLAYS—CORE MATERIAL

Key Points

- Role playing creates a "real" situation for people in which they can assume a different identity in order to try out new approaches or behaviors.
- Role playing is flexible and permits the trainer to respond to a broad range of training problems.
- Planning for role plays requires that the situation be realistic and consistent with the overall learning objectives of the training program.
- Most of the common problems in managing role plays can be avoided by a carefully prepared and delivered introduction.
- The effective processing of a role play must permit participants to reflect on and analyze what occurred during the role play itself.

ROLE PLAYS*

Introduction—Why Use Role Plays?

Role plays permit learners to re-enact situations that they currently encounter on the job, which they will encounter in the future, or which they perceive to be job-like. Through such re-enactment they can consider previous behavior, try out new behaviors they have just acquired, or experiment with behaviors they think are potentially useful.

Role plays create a nonthreatening atmosphere in which individuals can actively demonstrate problem situations, or "test the water," trying out new, unfamiliar behaviors through an anonymous identity. Participants are allowed to carry out decisions without the danger of embarrassing or incriminating themselves in "real" stituations. Role playing can increase participants' awareness about the effect of feelings on social behavior.

*Some of the material in the following sections is adapted from John Jones and J. William Pfeiffer, "Role Playing," *University Associates Annual, 1979.*

Participants typically experience role playing as an engaging activity. Because almost everyone knows how to play someone else's role, they tend to enjoy role plays, and it is unnecessary for them to learn new skills in order to benefit from the process. When role playing is conducted skillfully, the situations have a high credibility for participants, thereby reducing resistance to learning relevant skills and theory.

The technique is highly flexible. The facilitator can change the role play as it is being conducted, and the materials can be edited to fit particular situations. Role playing can be engaged in for brief or long periods of time. The role play situation can be manipulated by the facilitator to produce the desired effect.

Additionally, role playing can be helpful to respond to attitude objectives. Because it is involving, participants explore their personal reactions and feelings when talking about the experience. Not only do participants learn about themselves, they also have the opportunity to become aware of "other" players' points of view. Finally, role playing is a technique that allows for the complexity of real life within a simulation.

Design Considerations

In creating role play situations there are a number of useful design considerations. Within the situation itself and the descriptions of the roles of individual players, it is often important that there be a broad range of human problems. Unless the role play is intended to demonstrate ineffective behavior, participants should be given an opportunity to behave effectively. This is particularly true if the major objective of the role play is to develop skills, in which case the emphasis should be on acknowledging and reinforcing the desired results.

In the role play situation it is ideal to have conflict and variety. Generally, however, it is desirable to avoid getting too close to actual current organizational situations. Using actual problem situations as the content of role play activities can have a number of negative consequences, including the following:

- Participants may become defensive.
- They may concentrate on solutions rather than focus on aspects of the problem.
- Basic disagreement on issues may be generated, leading to polarization within the group.

In setting up role play situations it is, therefore, best to use simulated problems before attempting to use real organizational problems.

Planning for Role Playing

Role plays must be planned for carefully to ensure that the activity is relevant to the goals of the session and that it serves as an effective learning instrument.

- Pick a situation that is realistic to the training participants and consistent with the learning objectives.
- Define the problem or issue in the situation that the players will have to deal with.
- Determine the number of role players needed.
- Develop the specific roles for each person by answering the following questions:
    - — What is the person like?
    - — What is important about their background?
    - — How do they feel about the other people?
    - — How do they feel about the situation?
    - — What do they think about the situation?

These role questions can be written or given verbally to the players.

Writing Role Play Materials

It is important to develop clear, concise, and highly focused materials for use in a role play. They should be readable and not too lengthy or too complicated for a participant to remember. Ordinarily a role play requires some case background data to set the scene for the participants. Occasionally, further information ("bulletins," "telegrams," "letters," notes, etc.) is used to affect the role play as it progresses. The role descriptions should be written in uncomplicated language for the individual players and should include some hints on how to play the role.

Observer background data sheets need to be provided for persons in the audience. It is highly desirable for observers to have paper-and-pencil instruments to focus their reactions. Otherwise there may be a tendency to overpersonalize the observation and fail to focus on the specific learning intended.

Instead of using prepared written role materials, participants can create their own roles. This approach minimizes the need for printed materials, but it is often more difficult for the facilitator to manage in that the outcome is less predictable and may not be consistent with the expressed learning goals.

Setting Up Role Plays

From the facilitator's point of view, the first role playing is crucial. It is at this time that the group's attitudes to the technique will be determined and their future performance as role players will be settled. The role playing session should start with the facilitator briefing all the participants. He/she should outline the situation that is to be the basis of the role play, and should give a concise description of the characters involved in the situation. The group then acts out the situation, making up their lines as they go along. At the end of the scene, the actors and the audience discuss what has taken place during the scene, the motivations of the people involved, and why the scene developed as it did.

In a role play situation that is set up effectively, both the actors and the audience become involved. This involvement often carries over into the post role play discussion, thereby enriching and enlightening it.

If the trainer wishes to involve the audience further, he/she may give members of the audience definite tasks to carry out during the scene. For instance, one member of the audience may be required to note the gestures and mannerisms of the actors, another may be briefed to listen for significant remarks, and yet another may be asked to try and spot focal points of the drama.

It is possible to use the role play in small groups, having several role plays occurring at the same time. This makes it more difficult to manage the processing of the learning but creates an opportunity for more people to be directly involved.

Regardless of the number of role plays and types of participation, role plays are always started the same way:

1. Describe the purpose of the role play.

2. Describe the situation briefly and clearly, even if prepared written roles are used.

3. Unless everyone is participating, select the role players. (A volunteer who gives a "bad" performance could lose face before his or her peers.) Take care in assigning roles (e.g., do not choose people who might overidentify with the problem, etc.).

4. Brief the actors. Allow enough time to understand or read the roles. Tell role players to make up facts or information not covered in roles, or that they forget, but that seems necessary. Tell them not to try to "stump" other actors and not to "overact."

5. Assign tasks or structure what the audience (observers) should be looking for.

6. Set the scene. Label props (if used) and strategically place role players to define the physical situation and mood. Help relieve any tension/anxiety of the actors by smiling, making physical contact, and checking for readiness.

It is important to remember that most of the common problems in managing role plays can be avoided by a carefully prepared and delivered introduction.

Implementing Role Plays

Once the stage is set and everyone knows their role or task, you are ready to begin.

- Start the action. When several groups are involved, all should begin at the same time.
- Stay out of the line of vision of the role players. Quietly observe.
- Coach only if absolutely necessary (if a role player has difficulty getting started or breaks out of the role, etc.). If you are using a "stop action" role play in which it has been explained beforehand that you will be interrupting the role play at various points to discuss or add information, or switch roles, coaching is acceptable when the action is stopped.
- Cut the role play. Try not to be too abrupt. Do not continue the action too long; often the role play will arrive at a natural end point. Just a few minutes of interaction can provide data for a long discussion, so do not overload the audience.
- Thank the role players, using their real names. This removes them from their roles and provides a bridge to the discussion that follows.

*Processing Role Plays**

Role plays need effective processing. The processing phase is where the participants analyze and reflect on what occurred during the role play itself. It is a time for analyzing what worked and

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*Wilma J. Gormley and James A. McCaffery, PhD, *Guidelines for Processing Role Plays*, Training Resources Group, Alexandria, Va., 1982.

what did not. It is a time for reflecting on what skills or strategies are needed to successfully handle the situation.

Since the role play itself usually generates much activity and enthusiasm, the participants are eager to share opinions, ideas, etc. The facilitator needs to manage this phase carefully, balancing the need for an orderly discussion with over-control that tends to shut down the activity and enthusiasm.

Poorly conducted processing sessions can result in confusion, lost or undiscovered learning, and ineffective input for the next phase, generalizing. While processing is important, and at the same time difficult, the following processing plan should work effectively for most role plays:

1. The facilitator asks the group: "What was ___________'s strategy? How was it working?" Two or three opinions should be solicited from the group before moving on to the next question.

2. The facilitator then repeats the question to the group for the other role player(s). "What was __________'s strategy and how was it working?" Again, two or three opinions should be solicited before moving on.

3. The facilitator should then ask the role players: "What was your strategy? How did you feel it worked?" Allow the role players a few minutes to discuss their strategies and feelings (sometimes called "de-roling"), and then move on.

4. The facilitator then asks the group: "What strategies would you have used? What difficulties might you expect?" This discussion may be allowed to continue for a brief time before moving into the generalization phase.

JOURNAL

Role Play Delivery

1. What are the most important things I need to remember about delivering (including processing) a role play?

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2. How can I use role plays appropriately in my training programs—what are some specific opportunities that I can think of in the next few months?

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Handout 13-1

THE ROLE OF THE TRAINER*

COUNSELS CLIENT-MANAGERS

CONSULTANT

Develops client relationships
Analyzes performance problems
Recommends solutions
Establishes program goals (with client-managers)
Evaluates programs

ADMINISTRATOR

Prepares budget
Monitors expenditures
Manages facilities
Writes reports
Draws upon resources (inside and outside the ministry)

DESIGNS AND DELIVERS TRAINING

DESIGNER

Selects methods
Selects media
Integrates methods and media
Provides outlines and materials
Evaluates programs as data from pilot workshops indicate

INSTRUCTOR

Delivers learning design
Adapts design to learner needs
Provides feedback
Counsels learners
Provides feedback to designers on strengths/weaknesses of designs

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*Adapted from D. Laird, *Approaches to Training and Development*, Addison-Wesley, Reading, Mass., 1985.

THE FOUR STAGE MODEL

Planning and Managing a Training Event

Stage 1: Assessing Training Needs

What do the trainees need to know or be able to do to perform well on their job?

What is the knowledge level and skill level of the trainees at the start of the program?

↓

What do trainees need or want to gain from the training?

Stage 2: Training Program Development

Formulate Goals → Construct a General Training Plan → Design Detailed Sessions → Arrange for Delivery of Training

Stage 3: Organizing the Event

Develop Monitoring Checklist

↓

Get training staff agreement on monitoring and problem-solving duties

Handout 13-2
Page 2

Stage 4: Evaluation of Training

Reassess levels of knowledge and skill trainees have after training → **Evaluate overall results of training**

Handout 13-3

HOW TO BE AN EFFECTIVE CONSULTANT

1. Listen...be clear about what the client's needs and perspective are.

2. Clarify what your expectations are in completing the task, and what your client's expectations are.

3. Clarify what your role is in completing the task.

4. Keep your client informed on progress...solicit frequent input and feedback.

CHARACTERISTICS OF AN EFFECTIVE TRAINING TEAM

1. Clear sense of group direction and individual roles.
2. Concern by team members for both individual <u>and</u> team accomplishments.
3. Openness to and ability to do creative problem solving.
4. Group participation in decision making.
5. Concern for both task and issues of "how are we doing."
6. Effective give-and-take of feedback.
7. Support for each other.

QUESTIONS TO CONSIDER BEFORE DOING A NEEDS ASSESSMENT

Before we begin to use any of the commonly accepted approaches to needs assessment, we must be clear about what we want to find out. Of course, where we focus our data gathering effort will have a lot to do with the nature of the problem.

When the training department is asked to do a training program, there is usually a problem in the organization someone believes can be fixed by training. More often than not, the source of this problem is perceived to be a deficiency in staff performance.

At this point in the process, it is the responsibility of the training department to find out the answers to the three basic questions.

- Is there a deficiency?
- Is it an important/critical one?
- Do the employees in questions know how to do their job properly?

As a member of the training department, the answers you get to these questions will lead you to select one of the following solutions:

- Develop or locate a training program for the appropriate people
- Select and develop a nontraining solution

In this session, we would like to show you a systematic way for gathering data that will enable you to answer the three questions (see above) and recommend a solution.

Once you have chosen the training solution, the general purpose of the needs assessment is to gather information that will enable you to define the limits and goals of the training program to be developed.

Handout 14-2

NEEDS ASSESSMENT INTERVIEW QUESTIONS

—SAMPLE INTERVIEW—

Possible questions to use in an interview with training manager.

1. Describe your job—what do you do?

2. What do you think the agency or organization's goals are?

3. What do you want them to accomplish with this training program?

4. What things are they expected to do better?

5. What kind of work experience have they had in the past?

6. What do you think their subordinates think they need to do better?

7. What does their supervisor see as the problem?

8. What kinds of things do you think they need to know in order to do their job better?

PRACTICE INTERVIEW

Practice doing a needs assessment interview.

One person in the group will play the interviewer. You will do an interview with the training manager. Role descriptions are as follows:

- Interviewer: The interviewer should solicit information that will help identify training needs of the interviewee. Probe by asking follow-up questions when the interviewee answers.

- Observers: Observe the interaction between the interviewer and the employee. Watch for probes and determine how effective they are. Be prepared to give feedback at the end of the interview.

Each interview should last about 10 to 15 minutes, followed by 5 minutes of feedback from the observers.

Notes from the interview plans and any data gathered during the interview should be saved for use in the next part of the simulation.

JOURNAL

Assessing Training Needs

1. What are the key things I have learned about assessing training needs?

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2. Think about your own organization and how decisions about training are made. What suggestions or actions could you make to improve how training needs are determined in your organization?

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FOUR STEPS FOR DEVELOPING A TRAINING PROGRAM DESIGN

Step 1

Formulate training goals from needs assessment data.

Step 2

Make a general training plan.

1. Goals for overall program.
2. Number of sessions and time required to cover each learning area.
3. The sequence of sessions within the overall schedule.
4. The objectives of each session.

Step 3

Design detailed sessions.

- Basic Design—build on specific training objectives.
- Selecting Learning Activities—include appropriate mix of learning methodology and decide which activities are appropriate for a particular group.

Step 4

Make arrangements for delivery of training.

Handout 15-2

JOURNAL

Training Program Development

1. What are the key things I want to remember about developing a training plan?

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2. What can I do to improve how training plans are developed in my organization?

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MAKING ARRANGEMENTS FOR DELIVERY OF TRAINING

This handout includes some of the things you should consider when making arrangements for training program delivery. As you gain more experience doing various programs, you may want to add your own set of reminders.

Two months or more before the training program:

_____ Select the date of the program

_____ Select and reserve the site

One month or more before the training program:

_____ Survey the site for size, lighting, ventilation, furniture needs.

_____ If off-site, check on transportation arrangements.

_____ Send a memo to potential personnel (map, if off-site).

_____ Meet with or call participants' supervisors.

_____ Contact appropriate person about opening and closing site.

_____ Locate audiovisual equipment and aids.

Notes:

One week before training program:

_____ Confirm number of participants.

_____ Have handout materials printed.

_____ Order refreshments.

_____ Secure ashtrays or decide on smoking policy.

_____ Obtain name tags.

_____ Obtain felt-tip markers.

_____ Obtain pencils or pens and notepads.

_____ Recheck handouts and audiovisual aids.

_____ Locate restroom facilities.

_____ Recheck equipment arrangements.

_____ Have a "dress rehearsal."

_____ Allot time for setting up materials.

_____ Test all equipment.

Notes:

Day of training session (a minimum of one hour before session):

_____ Organize materials on training table.

_____ Make sure room is set up properly.

_____ Tape electrical cords to the floor properly.

_____ Check for spare bulbs.

_____ See that refreshments are in place.

_____ Place notepads, pencils, name tags, etc., on tables.

_____ Test equipment again.

Notes:

You may want to include other checks in your planning. The following list is provided to help jog your memory. Consider those items that apply to your own situation.

Film projector
Slide projector
Overhead projector
Films
Screens
Video camera
Video recorder
Television monitor
Videotapes
Audio recorders
Audiotapes
Flipcharts
Extra easel stands
Extra flipchart pads
Markers for writing on flipcharts
Markers for writing on transparencies
Blank transparencies
Handouts
Calculator
Screwdriver
Slides
Overhead transparencies
Pliers
Staplers
Tape
Pins
Glue
Chalk
Meals
Mail
Hammer
Fee arrangements
Pencil sharpeners
Extension cords
Breakout rooms
Certificates
Registration materials
Photocopying facilities
Map
Expense forms
Evaluation sheet
Extra bulbs
First-aid kit
Extra notepads and pens
Scissors
3x5 index cards
String
Lens cloth
Matches

EVALUATION—A MEASUREMENT OF FOUR BASIC AREAS*

1. Measuring Reaction

This measures the participant's likes and dislikes of the program and should be done during and after a program. The purpose is quite obvious, particularly during the course of the program. Training will not be very effective if it does not interest the trainees, or if they do not accept the material presented.

There are a few important keys to measuring reaction:

(1) The measurement (at least in the early stages of a program) is best made in writing. This allows anonymity and encourages candid expression of opinion by the participants.

(2) The measurement can be partially quantified by using a scaled system, that is, by asking participants to express their reactions numerically to specific aspects. For example:

Was this session worthwhile: YES 1-2-3-4-5 NO

Rate the quality of the training facilities:

Inadequate	Adequate	Excellent
1	2	3

(3) The measurement should focus on three specific targets:

- Participants' feelings about the worth of the training
- How well they think the training is aligned with their needs
- Their reactions to the trainer(s)

By using scaled responses to these aspects, reactions can be tabulated quickly. The trainer obtains information to help him or her revise the direction or approach if necessary, and

*Some of the material in this section has been adapted from A Guide to Training in Human Services, Northwest Social Systems, Inc., Seattle, Wash. (undated).

improvements can be readily seen. An example of a written form for measuring reaction is a

> "Participant Reaction Sheet," a very simple form that encourages spontaneous expressions of feelings about the training (especially useful after sessions dealing with controversial issues)—see examples.

In addition to forms, open-ended written evaluations that do not ask specific questions can be used to measure reaction. Also useful are verbal discussion, observation by the trainer, and conferences with observers.

2. <u>Measuring Learning</u>

It is important to distinguish learning (the increase of knowledge or skill) from behavior (how someone does his or her job).

It is most useful to measure learning as quantitatively and objectively as possible for comparison purposes. One way is to measure learning before and after training. This is done by a pre-test (administered before training) and an identical post-test (after) and comparing the results.

A check of learning accomplished in attitudinal sessions can be partially obtained through direct observation by the trainer and through reaction sheets and discussions (in which participants express what they think they learned). A "General Evaluation of the Training Program" (or discussion) at the conclusion of a training program asks for trainees' opinions on the design and delivery of the training.

3. <u>Measuring Behavior</u>

Although learning may be measured and found to be positive, there is no assurance that job performance and behavior will be changed to incorporate the new learning. If the benefit is to take effect, several conditions are necessary:

- The trainees must have an opportunity to put the learning into effect and their supervisors must encourage them to use it.
- The trainees must realize that applying the new learning will make their job easier and more efficient.
- The trainees must be motivated to improve their job performance.

There are several factors to be considered when measuring behavioral change due to training.

- Enough time must elapse after the training to allow the trainee to put the new learnings into practice and for the change in behavior to be measurable.

- The measurement must be made by objective means. One way to ensure objectivity is to have various people do the measuring, including the trainee, supervisors, fellow workers, those he or she contacts (such as farmers), and subordinates.

- A comparison of behavior with that of other staff in similar jobs who did not receive training is also useful.

Essentially, changes in behavior following training can be measured by timing an evaluation of job performance at an appropriate interval to determine <u>improvement</u> attributable to training. Behavior is best measured several weeks following completion of a program.

4. <u>Measuring Results</u>

A training program, whatever its objectives, will usually generate a spectrum of results in both individuals and groups. Its purpose is to improve job performance in certain specific ways—not necessarily to produce changes in procedures or organization, and its capacity to improve an *organization's effectiveness* is limited. A reasonably accurate picture of the results of training will be possible only when there is an opportunity to compare the operation and effectiveness of an agency before and after the program.

Results are perhaps the most important measurement in the eyes of those who pay for training but the most difficult to measure:

- *All* results of the training should be taken into account but they are not always easy to identify.

- *Only* results attributable to training should be considered, but training never takes place in isolation so other influences are difficult to eliminate.

The kinds of identifiable results to look for might include

- Change in the amount of time needed to do certain tasks

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- Change in the number of client complaints
- Change in the number of errors made
- Change in number of visits to farmers (or other contacts)
- Change in atmosphere at staff meetings

EVALUATION METHODS*

An ideal evaluation shows quantitatively how well the objectives are met. However, even with well-developed specific objectives, it is not always possible to evaluate training quantitatively. Certain evaluation data will be based on opinions, feelings, observations, and interpretations of trainers and trainees. The best way is to plan the evaluation ahead and include several different ways to obtain pertinent information.

The following evaluation methods have all been used successfully and their most appropriate applications are indicated. Like all the methods and techniques discussed in this course, these are intended primarily as examples.

Pre-test/Post-test

An identical test (usually written) given before training and after. Most appropriate uses: Before-and-after testing gives a reasonable quantitative and objective reading of the information learned. It also helps to specify issues and areas of information needing reinforcement and review.

Opinion/Attitude Questionnaire

Open-ended questions given immediately following training (or periodically throughout training) to elicit reactions to the program or the trainers. Most appropriate uses: to determine participants' evaluation of overall program design, trainees' attitudes and behaviors, and the relevance of training to trainees' needs.

Trainer Observation

The direct observation throughout delivery of training. Such observations may be organized in several ways: listing problems encountered and how they were dealt with; noting trainer's reactions periodically during delivery; summarizing strengths and weaknesses of each session or whole program. Most appropriate uses: Observation is useful for all aspects but is particularly helpful in evaluating such things as program design; trainee reactions; trainee comprehension; training techniques; facilities and logistical arrangements; consultant trainers.

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Trainer/Trainee Group Evaluation Session

The trainer designs a training session to evaluate the program. Part of the time is set aside to check specific items, learning, and change. Part of the time is open for trainees to focus on what they think was most important or what hindered the program. Most appropriate uses: to determine trainees' reactions and learning; attitudinal changes; appropriateness of facilities; effectiveness of program design and delivery; trainer skills; involvement of trainees.

Post-Training Practice Session

Session in which trainees use skills and techniques presented in training, e.g., role play practice of meeting with a farmer. Most appropriate uses: skills learning (e.g., how to apply a new pesticide).

Follow-Up Trainee Evaluation Forms

A check two to three months after training to find out how training helped on the job (if not, what would have been more helpful?). Most appropriate uses: to measure results and behavioral changes in relation to trainees' job; points out needs for new training.

Follow-Up Supervisory Evaluation Forms

A check two to three months after training by supervisor(s) of the trainees. Since the supervisors did not attend the training, they cannot evaluate the program directly, but they can judge apparent behavioral, attitudinal, and skill changes of the trainee on the job. Most appropriate uses: to measure results and behavioral changes in relation to trainees' performance; skill and attitude changes; and unmet needs.

JOURNAL

Evaluation of Training

1. What are the key things I have learned about planning and conducting training evaluation?

____

____

____

____

____

____

2. Think about your own organization and how decisions about training are made. What suggestions or actions would improve

    a. How evaluations are planned and conducted?

    b. How the data from evaluations are used?

____

____

____

____

____

____

SESSION PREPARATION TASK

- Write the session plan in your own words, identifying the time needed for each step, for a total of 45 minutes maximum.
- Be prepared to display and explain the training event from which this session is drawn, and where the session fits in the overall plan.
- Decide who will do each step (one person may do the first two steps, the other the third and fourth—or you can alternate at each step).
- At each step, agree on the role and place of the person not taking the lead (sitting at the side, helping with flipcharts, etc.).
- The lead person for each step prepares the necessary flipcharts and handouts.
- The lead person for each step rehearses on his/her own, then with the other presenter.
- You have one hour and 30 minutes for this task.

Training Of Trainers

Observer's Checklist

Name of Participant: ____________________
Today's Date: ____________________

	4 Effective	3 Do Less	2 Do More	1 Not Done
1. CLIMATE SETTER				
a. Greets, puts people at ease	____	____	____	____
b. Asks questions related to subject	____	____	____	____
c. Asks particular question(s) that draws on their experience related to subject	____	____	____	____

Comments:

	4 Effective	3 Do Less	2 Do More	1 Not Done
2. OBJECTIVES				
a. Written and legible	____	____	____	____
b. Clearly explained	____	____	____	____
c. Action verbs	____	____	____	____
d. Measurable, observable	____	____	____	____

Comments:

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	4 Effective	3 Do Less	2 Do More	1 Not Done
3. EXPERIENCE (Circle: case study, role play, demonstration, small group task, other....)				
a. Technique(s) selected appropriate	____	____	____	____
b. Content presented clearly	____	____	____	____
c. Follows appropriate delivery sequence	____	____	____	____
d. Paraphrases/summarizes participants responses	____	____	____	____

Comments:

	4 Effective	3 Do Less	2 Do More	1 Not Done
4. PROCESSING				
a. Questions elicit participants reactions (thoughts & feelings) about experience.	____	____	____	____
b. Asks open-ended questions	____	____	____	____
c. Follows appropriate processing sequence	____	____	____	____
d. Paraphrases/summarizes participants responses	____	____	____	____

Comments:

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	4 Effective	3 Do Less	2 Do More	1 Not Done
5. GENERALIZING				
a. Asks questions linked to session objectives	____	____	____	____
b. Asks open ended questions	____	____	____	____
c. Writes the participants' answers	____	____	____	____
d. Paraphrases/summarizes participants' learnings	____	____	____	____

Comments:

	4 Effective	3 Do Less	2 Do More	1 Not Done
6. APPLYING				
a. Asks questions that encourage participants to apply learnings in back home situation	____	____	____	____
b. Asks open ended questions	____	____	____	____
c. Solicits examples & encourages back home use	____	____	____	____

Comments:

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	4 Effective	3 Do Less	2 Do More	1 Not Done
7. CLOSING				
a. Summarizes main points/learnings	_____	_____	_____	_____
b. Reviews objectives	_____	_____	_____	_____
c. Concludes, bridges to next session	_____	_____	_____	_____

Comments:

____
Total Time

Comments on Overall Session:

Name of Observer: ______________________ Signature: ______________________

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Handout 19-2

JOURNAL

Practice Training Round Two

1. What are the most important things I want to remember about preparing and delivering a training session?

____

____

____

____

____

____

2. What will I do differently when I prepare and deliver my next training session back at work?

____

____

____

____

____

____

ACTION PLAN

In order to help you apply what you have learned as a result of this workshop, we encourage you to do the following:

a. spend some time reviewing your journal entries from this workshop;

b. think of your training responsibilities and the training programs that await you when you return to work; and

c. answer the questions below.

1. From our discussions about the adult learner, what do you think it will be most important for you to remember?

2. What are the most important things you have learned that can make your presentations more effective? How will you incorporate this learning into your training?

3. **What training techniques are you most likely to use? How do you plan to use them?**

4. **What group facilitation skills do you need to keep working on?**

5. **What are one or two things you plan to do differently when you design your next training session?**

6. Where or from whom can you continue to get help and feedback on your training skills?

7. What are some changes you might make in your existing training programs (or in future ones) as a result of what you have learned in this course?

8. What are some other ideas you have about ways to strengthen the way training is done in your organization, from assessing training needs, to designing training plans, to evaluating training? What are some specific actions that you might take?

IMPLEMENTATION PLAN

1. Actions to undertake in the next 6 months	2. Desired outcomes of these actions	3. Resources needed • Human • Financial • Material	4. Possible constraints • Social • Technical • Political • Other	5. Strategy		
				a. Strategies	b. Tasks	c. Timetable

WORKSHOP EVALUATION

Part I: Goal Attainment

Please circle the appropriate number to indicate to what degree the workshop has succeeded in improving your ability to do the following:

1. Define the basic principles of adult education and of experiential learning.

1	2	3	4
Very Little	Somewhat	Well	Very Well

2. Use a design framework for preparing and carrying out training sessions.

1	2	3	4
Very Little	Somewhat	Well	Very Well

3. Demonstrate facilitation skills (paraphrasing, summarizing, asking questions).

1	2	3	4
Very Little	Somewhat	Well	Very Well

4. Give and receive constructive feedback.

1	2	3	4
Very Little	Somewhat	Well	Very Well

5. Describe the characteristics and the learning purpose of training techniques such as case studies, role plays, small group tasks, lecturettes, demonstrations, and field exercises.

1	2	3	4
Very Little	Somewhat	Well	Very Well

6. Deliver a session using one of these training techniques.

1	2	3	4
Very Little	Somewhat	Well	Very Well

7. Plan for and manage a training event.

1	2	3	4
Very Little	Somewhat	Well	Very Well

8. Adapt this training methodology for use in back-at-work situations.

1	2	3	4
Very Little	Somewhat	Well	Very Well

Part II: Success Analysis of the Workshop

Please answer the following questions as fully as possible. Use the back of the evaluation form if you need more space.

1. Which workshop goals most closely met your learning needs?

2. What was the most helpful aspect of the workshop structure?

3. What did the trainers do that was most helpful for you?

4. What problems arose that were overcome well in your opinion? How were they overcome?

5. Which workshop goals did not meet your learning needs? Which learning needs were not met by the workshop?

6. What part of the workshop structure was least helpful to you? Why? How could it be improved?

7. **What did the trainers do that was least helpful to you? Why? How could it be improved?**

8. **What other suggestions would you care to make to improve this workshop?**

9. **Other comments:**