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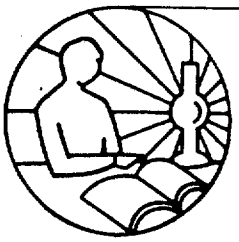

World Education

Training of Trainers I

Support for the Women's Associations of Yemen
SWAY

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210 Lincoln Street • Boston, Massachusetts 02111 U.S.A. • (617) 482-9485 • Telex 200178 JSI UR • Fax (617) 482-0617

A

TRAINING OF TRAINERS COURSE

AGENDA

DAY ONE

8:00-9:00	Session I:	Orientation/Expectations
9:00-10:15	Session II:	Basic Principles
10:15-10:30	Break	
10:30-12:00	Session III:	Experiential Learning Cycle
12:00-1:30	Lunch	
1:30-2:00	Energizers	
2:00-3:30	Session IV:	Trainer as Facilitator
3:30-4:00	Daily Evaluation and Process Discussion	

DAY TWO

8:00-9:30	Session V:	Training Model
9:30-9:45	Break	
9:45-12:00	Session VI:	Needs Assessment
12:00-1:30	Lunch	
1:30-2:00	Energizers	
2:00-4:00	Session VII:	
4:00-4:30	Daily Evaluation and Process Discussion	

DAY THREE

8:00-10:30	Session VIII: Activity Design	
10:30-10:45	Break	
10:45-12:00	Session IX: Developing Communication Skills	
12:00-1:30	Lunch	
1:30-2:00	Energizers	
2:00-4:00	Session X: Practicum Methods	
	a. Role Play	-Group Defines -Gives Parts -Lists Steps
	b. Case Study	-refer to One Problem, Two View -problem posing -solution to problem
	c. Story Cards	-few words & discussion starters -two group discussion activities

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DAY FOUR

8:00-9:00	Two Views/One Problem
9:00-10:15	Session XI
10:15-10:30	Break
10:30-12:00	Session XI
12:00-1:30	Lunch
1:30-2:00	Energizers
2:00-4:00	Session XI
4:00-4:30	Wrap Up

DAY FIVE

8:00-8:30	Step I
8:30-10:30	Session XII
10:30-10:45	Break
10:45-12:00	Present
12:00-1:30	Lunch
1:30-2:00	Energizers
2:00-4:00	Evaluation Session XIII
4:00-4:30	Wrap Up

SESSION 1. ORIENTATION

LEARNING OBJECTIVE:
Overview

MATERIALS:

- Newsprint
- markers
- tape
- Handout 1, Workshop Goals and Schedule

TIME: 1 hour

ACTIVITY

Step 1: Welcome participants. Conduct introductory activity.

Instructions. Give each participant a sheet of paper. Ask participants to draw pictures to illustrate their names. Divide participants into two lines standing opposite each other. Alternating sides, participants from one line guesses the participant's name (from the illustration) standing opposite her.

Step 2: Lead a large group brainstorm activity of participants' expectations. Discuss and combine similar ideas.

Step 3: Review Handout 1. Workshop Goals and Schedule. Compare expectations with goals and schedule. Negotiate modifications if need be.

Step 4: Review of Agenda.

Session 1.
Handout 1.

WORKSHOP GOALS

By the end of the workshop, participants will have:

- increased their understanding of learning theory;
- improved their understanding of how to use of needs assessment methods;
- increased their ability to design training experiences;
- demonstrated their ability to use several different training methods; and
- improved their skills in group facilitation.

SESSION 2. BASIC PRINCIPLES OF LEARNING

LEARNING OBJECTIVES:

By the end of this session, participants will be able to describe the types of learning they observe in demonstrations. Participants will also generate an initial list of the basic principles of learning. In addition, participants will assess their own learning experiences based on the initial list of the basic principles of learning.

MATERIALS:

- Worksheet 1, Role Plays - What is Learning?
- Role play descriptions and pictures for group role plays
- Handout 1, Principles of Adult Learning

TIME: 1 hour 15 minutes

ACTIVITY

Step 1: 10 min.

Introduce activity. Ask for two groups of volunteers to do the role plays. Give each group its own list of instructions.

Preparation time: Have each group meet and decide how it will conduct its own role play. Trainers meet with remaining participants and explain their role as observers.

Step 2: 20 min.

Conduct role play 1.

Conduct role play 2.

Step 3: 15 min.

Process the role plays:

a. Ask each group to report their observations.
-Role play #1
-Role play #2

b. Discuss each group's observations in the large group. Compare learning experiences in each role play from the perspective of the "teacher"and the perspective of the "learner." Use the following questions to help shape the group's analysis and discussion.

Questions:

- What is the role of the teacher?
- What is the role of the learner?
- Who decides what is taught?
- Which approach is more relevant to the daily lives and needs of adults?
- Who is learning what?
- How can you tell?

Step 4:
15 min.

Have the large group then list basic principles of learning by completing the following sentence:

Learning occurs when ...

Step 5:
15 min.

Ask participants to share examples from their own learning experiences.

-in their organization/project
-outside of their organization/project

Step 6:

Pass out Handout 1, List of Principles of Adult Learning and review both this list and the one created by the participants, noting similarities and differences.

Session 2.
Worksheet 1.

Role Plays - What is Learning?

Role Play 1.

Your role play should illustrate a learning situation similar to the one depicted in the attached picture. In this situation the teacher or trainer/community worker has engaged the learner directly in the learning process. This type or variations of this teaching/training approach includes the following:

participatory learning
discovery approach
learner-centered

You are to show a strong contrast to the more traditional, formal education approach frequently seen in schools in which the teacher stands in front of the students and lectures.

Role Play 2.

Your role play should illustrate a learning situation similar to the one depicted in the attached picture. In this situation the teacher or trainer/community worker is modelling a traditional classroom style where the teacher stands in front of the learners and tells them what she/he thinks the learners should know.

Session 2.
Handout 1.

This list is a revised version of Fredi Munger's "Key Concepts Derived From Theoretical Sources."

Key Principles of Adult Learning

1. Adults learn best from direct experience enriched by: discussions, explanations, and/or demonstrations.

2. Adults learn best in an environment that is non-threatening, conducive to experiential and participative learning, and open to group discussion.

3. Adult learning, in particular, occurs more effectively when adults work through collaborative action on issues which are close to the emotional center of the learner, i.e., are meaningful.

4. Workshops are more relevant if they respond to learners' needs and competencies and teach skills that can be used immediately.

5. Training workshops are more successful if they are developed in accordance with clear goals and objectives.

6. Staff and participants are more motivated if they have actively participated in the training design and/or implementation and evaluation decision making.

7. Workshops are effective only if they are developed in response to needs that genuinely are felt training needs.

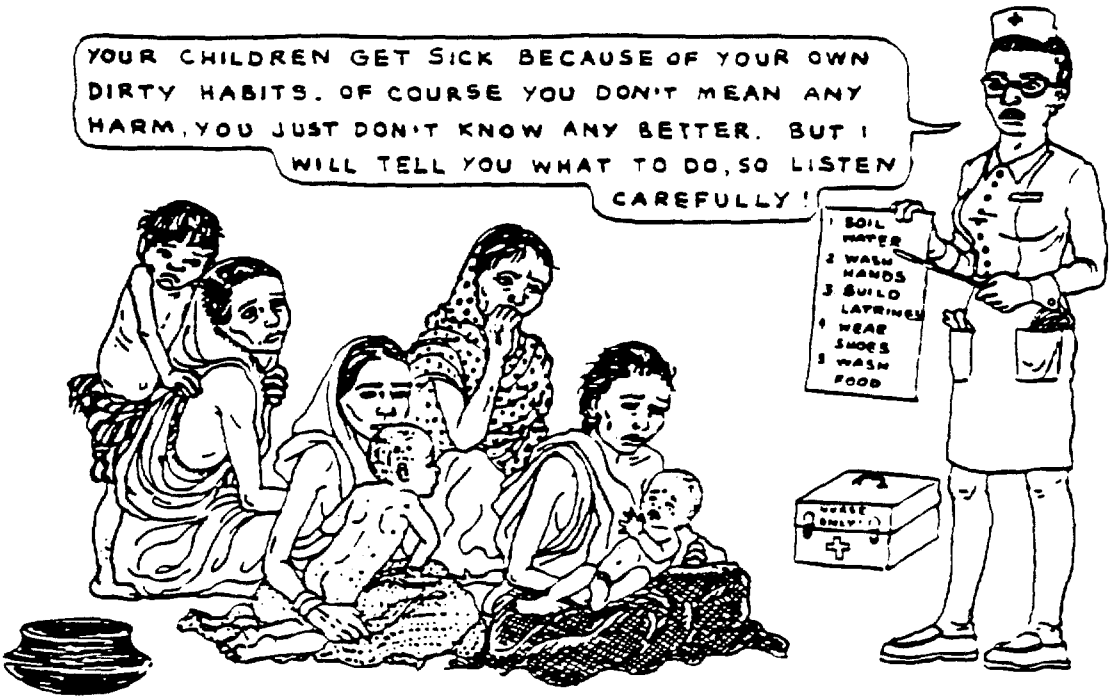
8. Adults learn best from educators who respect them, treat them like adults, allow them to be self-directed, who expect to learn as well as teach, who are competent to guide activities and discussions as well as lecture or instruct.

9. Workshop designs which create conditions or environments for facilitating learning allow for the most trainee development.

Picture for use with Role Play.

Now consider another example. Here, a health worker gets together with a group of mothers and discusses their problems with them. She starts by asking questions like these:

Picture for use with Role Play.



SESSION 3. PHILOSOPHY OF LEARNING

LEARNING OBJECTIVES:

By the end of this session, participants will describe five essential steps in the experiential learning cycle. Participants will also identify additional learning principles and add them to the list they generated in the previous session related to health education, nonformal education and training styles.

MATERIALS:

- Envelopes containing the five elements of the Experiential Learning Cycle
- Handout 1, Experiential Learning Cycle
- Handout 2, Characteristics of Nonformal Education
- Handout 3, Basic Principles of Health Education
- Worksheet 1, Review Exercise - KAP
- Worksheet 2, Kelman's Theory of Influence
- Resource material: Nonformal Education

TIME: 1 hour 45 minutes

ACTIVITY

Ahead of time, cut up copies of Handout 1.

Step 1:
15 min.

Give each participant an envelope with the pieces of paper. Ask the participants to do the following:

a. Read each piece of paper.
b. Then, put the pieces of paper in the order in which the thought processes, or actions are likely to occur.
c. Then, discuss the steps with a partner to see whether you are in agreement.

Step 2:
15 min.

Then, in a large group, discuss each of the steps and the sequence. Give examples. Provide Handout 1.

Step 3:
15 min.

Hand out Characteristics of Nonformal Education and relate to the two role plays in the previous session. Use Resource Material: Nonformal Education to prepare a lecturette on the topic. Remember, no more than five minutes.

BREAK

Step 4:
60 min.

Reconvene the group and explain that you will be focussing on health education theories in this part of the session. In doing so, the group will be looking at KAP and Kelman's Theory of Influence. Briefly explain each, saying that you will use two worksheets as a way in which to examine each in greater depth.

Step 5:

Give Worksheet 1, KAP. Ask participants to read the first page of Worksheet 1 and answer the four questions at the bottom of the page. Once they've completed the page, read the paragraph (or have a participant read it), and then ask for the answers to the four questions.

Ask participants if they've used this kind of material before, then explain that it is called programmed instruction, a method in which learning is checked immediately before moving on to new information, and more questions on the new information.

Ask participants to read the three case studies which follow, answering the questions listed after each, and then checking their answers.

As a last activity on KAP, have the group do questions 18 - 23 as a large group discussion activity.

Step 6:

Give out Worksheet 2. Prepare a lecturette on the three types of influences which can change people's behaviors, using Worksheet 2. Then hand out Worksheet 2, asking participants to read the first page and then answer questions 1 - 9.

Then read each question, asking participants for their answers. When the wrong answers are given, ask the group if they agree and if not, seek the right answers.

Read the section Significance aloud and ask participants to answer the remaining five questions. Review each question and seek consensus from group members on the answers to the questions.

Use the section entitled Conclusions as a summary for the activity.

Session 3.
For use in the Envelope Exercise

EXPERIENTIAL LEARNING CYCLE

Experience, Action, Problem Solving (Learner participates in real or simulated experience.)

Reflection, Discussion Analysis (Learner works alone or in groups analyzing the experience.)

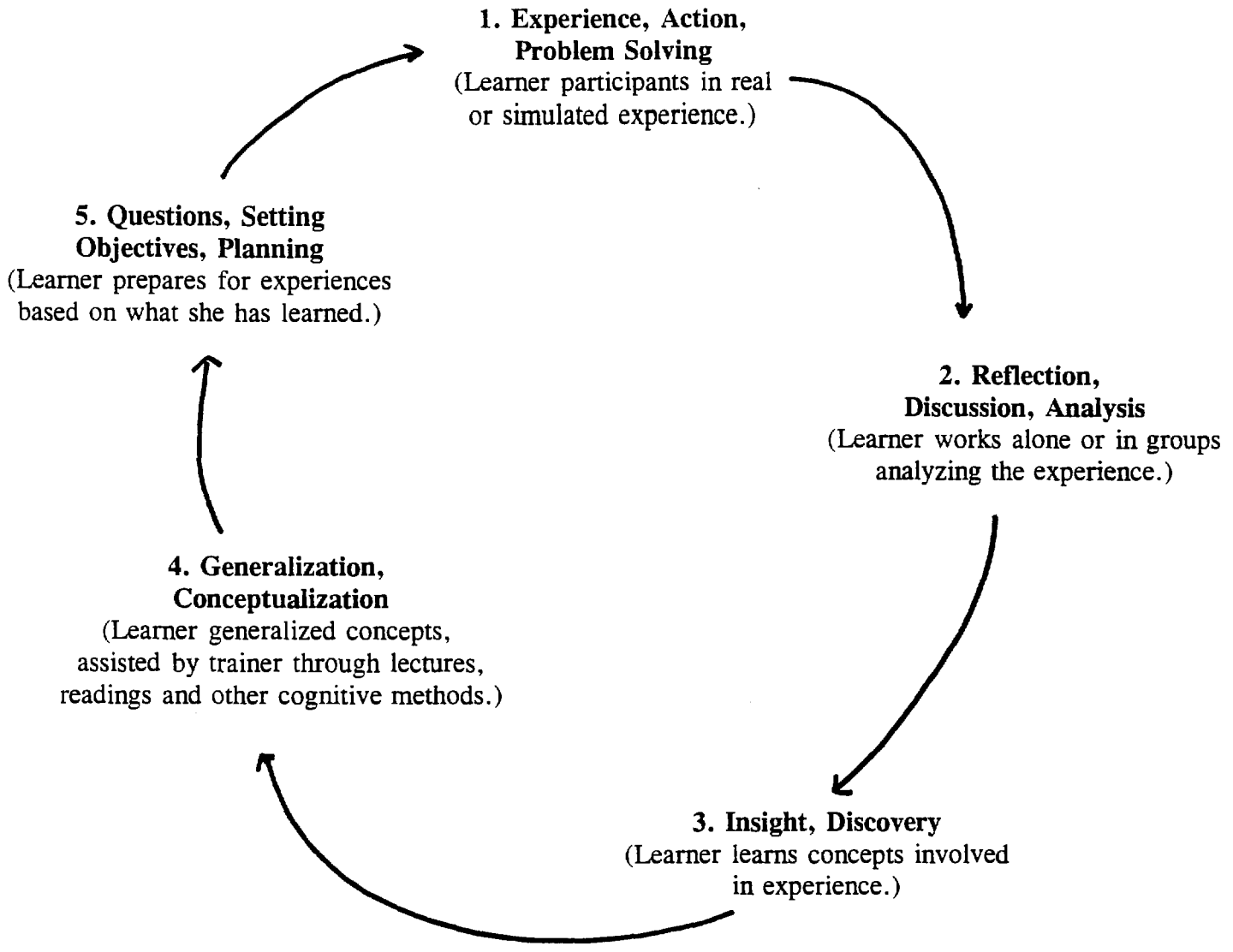
Insight, Discovery (Learner learns concepts involved in experience.)

Generalization conceptualization (Learner generalized concepts, assisted by trainer through lectures, readings and other cognitive methods.)

Questions, Setting Objectives, Planning (Learner prepares for experiences based on what she has learned.)

Session 3.
Handout 1.

EXPERIENTIAL LEARNING CYCLE



Experiential Learning

Experiential learning considers the background of experiences of the participants and how people learn, so that training activities can be designed to allow participation in real or simulated experiences. Thus, the act of learning involves problem solving, analysis, and conceptualizing and utilizing information for planning in their own situations. Training methodologies include case studies, critical incidents, role play, programmed instruction, and discussion and dialogue.

Session 3.
Handout 2.

CHARACTERISTICS OF NONFORMAL EDUCATION

Formal Education	Nonformal Education
A. Purpose	
1. Long-term, general	1. Short-term, specific
2. Credential-based	2. Non-credential based
B. Timing	
1. Long cycle	1. Short cycle
2. Preparatory (provides the basis for future participation in society and economy)	2. Recurrent (depends on the immediate learning needs arising from the individual's roles and stage of life)
3. Full-time	3. Part-time
C. Content	
1. Subject-centered, Standardized (limited emphasis on psycho-motor or affective considerations)	1. Problem-centered, Individualized (task or skill centered)
2. Academic	2. Practical
3. Clientele determined by Entry requirements	3. Entry requirements determined by clientele
D. Delivery System	
1. Institution-based	1. Environment-based
2. Isolated	2. Community-related
3. Rigidly structured	3. Flexibly structured
4. Teacher-centered	4. Learner-centered
5. Resource-intensive	5. Resource-saving

E. Control

1. Externally controlled
2. Hierarchical (internal control is based on role-defined relations among teachers and between teachers and learners)

1. Self-governing (autonomy at program and local levels)
2. Democratic (control vested in learner and the local community)

(Adapted from Tim Simkins, Nonformal Education and Development. Manchester Monographs, 1976, pp. 12-13 by Mullinex, Graybill, et al.)

Session 3.
Worksheet 1.

(K)nowledge, (A)ttitude, (P)ractice

K.A.P. are 3 very popular letters in the field of health education. They stand for:

Knowledge
Attitude
Practice

These 3 letters are popular because they are useful to most discussions on how to get people to change their health practices. Why? Because these 3 concepts roughly reflect the gross stages that people go through during the change process. for someone to change their behavior, they first need some Knowledge of the new behavior (desired by the health worker). They then need a positive Attitude towards this new behavior, and finally, when both K and A are accepted, the KAP theory says that Practice or the new behavior, will occur.

---

1. Fill in the words that KAP stands for:

K_____
A_____
P_____

---

2. The one component in this theory that should occur before the other two is:

_____

---

3. The one that theoretically follows the first two is:

_____

---

4. The one that must be changed if health is to change is:

_____

Answers:

1. Knowledge, Attitude, Practice
2. Knowledge
3. Practice
4. Practice

KAP is useful in giving people a simplified explanation of why people's behavior doesn't change when these people know the facts. They know the facts (K), but they don't change their behavior (P) because they did not change their (A) towards the facts.

Aleke has listened to the lecture on the dangers of smoking. He can now tell you the facts on increased chances of getting lung cancer and heart disease from smoking.

5. Will he definitely stop smoking now that he can quote some statistics on the effects of smoking?

Of course he will..... Of course he won't.....
Yes, probably..... No, probably not.....

6. What is probably missing?
..... of KAP

Answers:

5. No, probably not.
6. A

Kamau started smoking when he was 17. When Kamau was twenty, his uncle, whom he loved very much, died a slow, painful death from lung cancer. His uncle was a heavy smoker, and the doctor explained it was almost certainly the smoking that caused the disease. Kamau felt the death shouldn't have happened.

Kamau doesn't know any of the statistics on the effects of smoking.

7. Is Kamau likely to stop smoking?

Yes, probably..... No, probably not.....

8. Does Kamau have more K or more A?

K..... A.....

9. Of the 2 men described above, which has the more knowledge?

Aleke..... Kamau.....

10. Which of the 2 men is more likely to change his behavior?

Aleke..... Kamau.....

11. Is the level of knowledge the most important motivation for changing behavior?

Definitely yes..... Definitely no.....
Yes, usually..... No, not usually.....

12. Which is often more important in changing behavior?

Answers:

7. Yes, probably
8. A
9. Aleke
10. Kamau
11. No, not usually
12. Attitude

An extension worker is giving a talk to a group of small business owners in the small business extension center. She is well-organized, and presents how to set up an accounting system clearly and simply. She talks for 20 minutes, then ends her talk with a very pleasant story.

13. If you were her supervisor, how would you rate this talk overall?

.....absolutely great .....all right
.....very fine .....needs improvement

14. What is the extension worker's talk primarily aimed at changing?

K..... A..... P.....

15. Is the audience likely to adopt the new behavior the extension worker wants them to adopt?

Definitely yes..... Definitely no.....
Yes, probably..... No, probably not.....

16. Did the extension agent involve the small business owners in the topic?

Yes..... No.....

17. When people are not involved, are they likely to be influenced?

Definitely yes..... Definitely no.....
Yes, probably..... No, probably not.....

Answers:

13. Needs improvement
14. K
15. No, probably not
16. No
17. No, probably not

---

18. What does the extension agent need to do to improve her talk?

.....make it longer .....use more audio-visual aids
.....involve the participants more .....present only 1 part at a time

19. What major educational techniques are used by your government extension staff to train small business owners?

.....individual consultation .....talks at organizations
.....talks in the small business center .....on television

20. Which of these requires primarily passive learning?

.....individual consultation .....talks at organizations
.....talks in the small business center .....on television

21. Which of these are primarily giving information (K) rather than changing feelings (A)?

.....individual consultation .....talks at organizations
.....talks in the small business center .....on television

22. Which is easier for the health staff to do?

.....presenting facts to the people .....getting people involved

23. Which is likelier to be more effective at changing people's health practices?

.....presenting facts to the people .....getting people involved

---

Answers:

18. Involve the audience more
19. All of these are used
20. All, except the individual consultations which are done well
21. All, except the individual consultations which are done well
22. Present facts to the people
23. Getting people involved

Adapted from: K.A.P. by Louise Wohl, M. Ed., M.P.H.

Session 3.
Worksheet 2.

KELMAN'S THEORY OF INFLUENCE

INTRODUCTION

Kelman said that there are basically 3 types of influences which can change people's behavior - compliance, identification, and internalization.

COMPLIANCE

is when a person changes because the consequences of not changing are more unpleasant than changing. In compliance, there is the element of "or else." For example: a mother has her child get a small pox vaccination or else the child won't be admitted to school. Or, a small business owner can't get a loan unless he receives training in how to set up his accounts.

IDENTIFICATION

is when a person changes because of his feelings for the person who's associated with the new behavior. Example: a boy wears clothes like his father's because he wants to be like his father. Or, a woman accepts family planning because her best friend has told her of the benefits. Or, a woman's cooperative business begins to offer a wider variety of woven purses because their trusted extension agent advised them to do so.

INTERNALIZATION

is when a person changes because he accepts the desirability of the new behavior. He wants to change because of the advantages of that change. For example: a man uses fertilizer on his crops because his crops will be bigger. Or, factory workers decide to form a union in order to increase their influence in changing unsafe working conditions.

APPLICATION

Reread the above explanations and, then, answer the following questions.

1. When a midwife prepares a well-balanced meal containing taboo foods for toddlers so that the mothers can see that these foods do not harm the child, she is trying to use:

_____

2. When a boss comes and says "I will give you one day to finish this report," the boss is using:

_____

3. When a movie star's picture is put on a billboard saying "My wife and I practice family planning," the campaign people are trying to use:

_____

4. When a credit officer sends a letter of warning to a defaulter, she is using:

_____

5. When a health educator is giving a group talk in the clinic, and she says, "I hope you wash your toddlers hands before he eats," she is using:

_____

6. When a community development worker conducts a group meeting to learn what the priorities of the community are, he is using:

_____

7. You are a very popular nurse in the community. You've grown your own vegetable garden, and today you noticed your neighbors out breaking ground for their garden. You've never talked to them about the nutritional benefits of fresh vegetables which are very difficult to get. Most likely, the type of influence here is:

_____

8. When you see parents yell at their children to stop doing something, you know the shouter is trying to influence through:

_____

9. As a supervisor, you are asked a question. Instead of giving a direct answer, you gently ask a few questions which lead to the answer. You are trying to use:

_____

SIGNIFICANCE

All 3 types of influence are useful and all at some point in your work will be used. This does not mean, however, that they are equally desirable. Quite the contrary!

Think about the following questions before you answer them.

10. Which type of influence seems the most likely to stop once the source of influence is no longer around?

_____

11. Which type seems the most likely to continue once the source of influence is no longer around?

_____

12. Which type requires authority over the people you are trying to influence?

_____

13. You are a supervisor and have tried to improve some behavior of your staff. One week you are away 3 days. You come back unexpectedly and find your ideas for improvement had not been followed while you were away. Which type of influence did you succeed in using?

_____

14. Two years ago you were a small business extension agent in Lugari. You had taught a group of entrepreneurs how to do business planning and marketing. Today you have make a trip back to Lugari and you have found that the entrepreneurs are still doing what you taught them 2 years ago. Most likely the type of influence was:

_____

CONCLUSION

Most likely, your job in community development - either in health or microenterprise development requires you to change people's behaviors. Yet, how you do this is as important as whether you do it; for desired behaviors need to be a permanent change and not just a temporary one. How you influence people reflects how long that change will last.

Answers:

1.	internalization	2.	compliance	3.	identification
4.	compliance	5.	identification	6.	internalization
7.	identification	8.	compliance	9.	internalization
10.	compliance	11.	internalization	12.	compliance
13.	compliance	14.	internalization		

Adapted from: Louise Wohl, M. Ed., M.P.H., Kelman's Types of Influence.

SESSION 4. THE ROLE OF THE TRAINER AND THE TRAINEE

LEARNING OBJECTIVES:

By the end of the session, participants will be able to describe training styles of trainers that are directive, participative and facilitative.

MATERIALS:

- Envelopes with strips of characteristics cut up from Handout #1, The Role of Trainer and Participant in Directive and Participative Learning Environments
- Handout #2, Program Designs that Encourage Self-Directed Learning
- Handout #3, Facilitator's Role

TIME: 2 hours

ACTIVITY

Step 1: Explain that this activity will help participants focus on the roles of trainers and participants in different learning environments. Explain that in nonformal education our goal is to have trainers who are participative and facilitative and that this is often difficult as many of our trainers will have had more experience in educational activities that are more directive in nature.

Step 2: Explain the "Envelope Exercise." Each envelope contains fourteen strips of paper, each of which describes characteristic trainer/trainee roles which may be traditional or which may be participative/facilitative. The strips cannot be both, they must be one or the other. Participants should read each strip and then put it into one category or the other - traditional/directive or participative/facilitative. Give participants time (20 min.) to complete the exercise. Once participants have finished, give them a copy of Handout #1 to check her own work.

Step 3: In a large group, discuss participants' thoughts about trainers' role in creating learning environments and how participants' roles change with different environments. Explain the diagram shown in Handout #2. Tie this discussion into the role of Trainer as facilitator.

Step 4: Review behaviors described in Handout #3.

Session 4.
Handout 1. Nanette Brey Magnani

TRAINER/TRAINEE ROLES IN A PARTICIPATIVE ENVIRONMENT

TRADITIONAL	PARTICIPATIVE/FACILITATIVE
1. The trainer teaches and the trainees are taught.	1. The trainer assists the trainee to learn and to act according to their own needs.
2. The trainer knows everything and trainees know nothing; consequently, the trainer chooses and enforces his choice and the trainees comply.	2. The trainer realizes that s/he does not know everything and uses the trainees as a valuable learning resource in defining their own learning needs.
3. The trainer thinks and the trainees are thought about.	3. The trainer encourages trainees to participate in identifying objectives/content for programs and includes them in problem-solving activities.
4. The trainer disciplines and the trainees are disciplined.	4. The trainer leads group, serves as member of group and encourages active expression from the group.
5. The trainer chooses the program content and the trainees (who were not consulted) adapt to it.	5. The trainers and trainees work together to plan programs based on the trainees' learning needs.
6. The trainer is the subject of the learning process while the trainees are mere objects.	6. The trainer is a motivator of the learning process and, therefore, designs learning experiences based on the trainees' needs.
7. The trainer talks and the trainee listens - meekly.	7. The trainer feels the trainees (participants) are peers and includes them in exploring alternatives to problems, creates group spirit among the trainees, establishes a trusting relationship and maintains a climate of mutual acceptance.

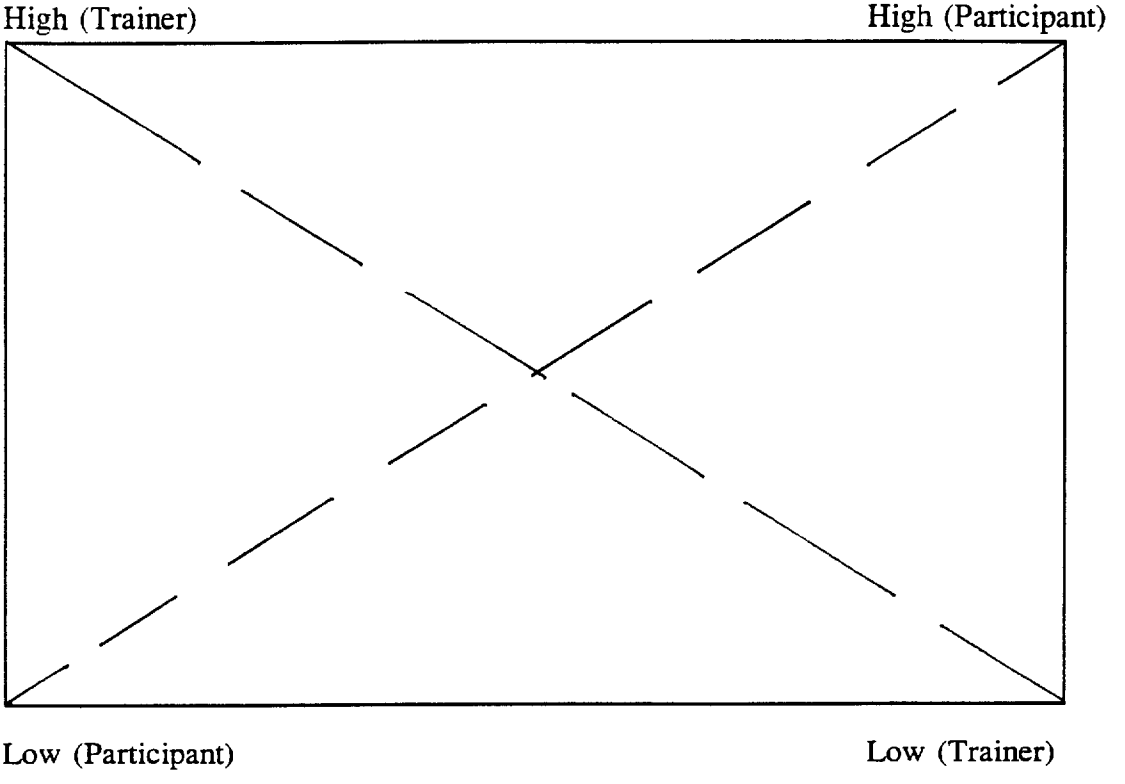
Exercise developed from Lyra Srinivasan. Perspectives on Nonformal Adult Learning. New York: World Education, 1977, p. 5.

Session 4.
Handout 2.

PROGRAM DESIGNS THAT ENCOURAGE SELF-DIRECTED LEARNING

Programs should be designed to encourage a shift in who controls the learning process and decisions - from greater trainer involvement at the outset to less trainer involvement as the program moves along, and from less participant involvement at the outset to greater participant involvement as the program moves along.

DEGREE OF TRAINER AND PARTICIPANT INVOLVEMENT



Ask participants where they are on the field?
Ask participants where the trainers are on the grid?
Should the situation be different?
How could it be different than it is?

Session 4.
Handout 3.

FACILITATOR'S ROLE

A facilitator is different from the typical leader or chairperson. The difference is in how they use their role. The leader/chairperson decides what and how things will be done, tells people they are out of order, etc. The facilitator asks, suggests, reminds, keeps track of the main agenda and then sees if people are ready for a decision. Generally the facilitator is there to see that all members feel they are having a say and are listened to and accepted. She attempts to stay very neutral. A facilitator tries to provide just enough structure so that what's happening between people doesn't interfere with the topic on the agenda.

Following are a number of points a facilitator should keep in mind:

Keep Members on the Topic:

- Let members know when the discussion has drifted. Usually they will quickly return to the topic at hand.
- Every now and then repeat the topic under discussion. "Isn't this what we were discussing?"

Summarize What Members Have Said:

- In particular, summarize what less active members have said. "Your feeling is that..."
- Relate what one person says to others' ideas. "It sounds like you're adding to what Robbie said."
- Accept parts of ideas and ask if the person could develop the idea more.
- Let people know when someone has been cut off and ask them to finish what they were saying. "I think we've cut Duane off, did you have more you wanted to say?"

Let People Know That Feelings Are OK:

- Summarize feelings as well as content. "Dave, you seem to be disturbed about something."

State the Problem in a Constructive Way So People Can Work on It:

- State the problem like a problem, not like someone is at fault.
- Give problems and questions to the group, not answers.
- Clear up what decision the group needs to make so people don't waste their time on other things.

Suggest Ways To Solve the Problems:

- Let members know when it may be time to move on to the next problem or agenda item.
- Try to break up giant problems into workable pieces and deal with each separately.

Every Now and Then Summarize What Has Happened/Been Decided:

- Be sure to restate a decision after it has been made by the group.

Things Facilitators Should Avoid

In no way will the facilitator be effective if she does not remain neutral. She should not become a key participant in what's happening, nor try to manipulate the group by using the facilitator's role to get her personal agenda on the table.

The Facilitator should specifically avoid:

- criticizing the ideas or values of others;
- forcing your own ideas on the group by using your facilitator role (When you must add your own ideas, let people know you are doing so as a member and not as facilitator. It may at times be better to ask someone else to be the facilitator so you can get into the battle.);
- making decisions for the other members without asking them for agreement;
- saying a lot or getting too involved when you are the facilitator (this could distract you and might get the whole group off track).

SESSION 5. OVERVIEW OF TRAINING PROGRAM DEVELOPMENT MODEL

LEARNING OBJECTIVE:

By the end of this session, participants will have an increased understanding of the overall steps in a training program development model.

MATERIALS:

- Handout 1, World Education's Training Model
- Handout 2, Notes on Steps in the Planning Process
- Handout 3, 4, 5, (Needs Assessment Approaches)
- Handout 6, Itemized Response Technique Format

TIME:

1 hour 15 minutes

ACTIVITY

Step 1: Lecturette. Distribute copies of Handouts 1 and 2. Review each step. Ask participants to relate their personal experiences with each step of the training model. The Trainer should record these experiences as part of your own needs assessment information.

Step 2: Pass out Handouts 3, 4 and 5 for participants to review overnight.

Step 3: Explain that one of the roles of participants in this training is to conduct the warm-ups or ice breakers at the beginning of training in the morning and after lunch. Ask for volunteers to sign up as co-trainers. Put the following matrix on flipchart paper and post it on the wall so that participants can sign up to cofacilitate at specific times.

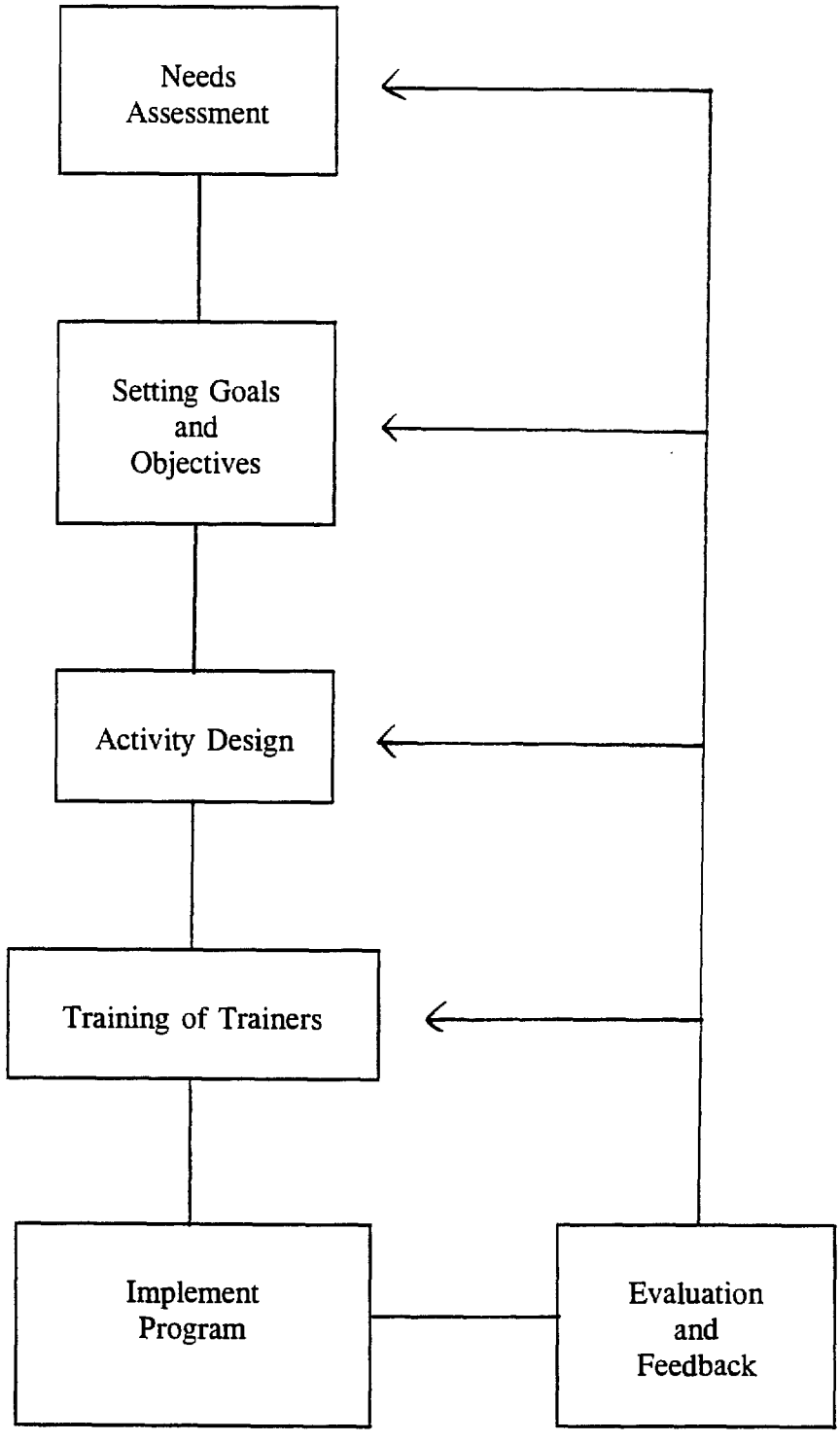
	Tues.	Wed.	Thurs.	Fri.
AM				
PM				

Step 4: Summary/Feedback. Review day's activities and ask participants to add additional principles of learning to their earlier list based on today's experience.

Lead the itemized-response feedback activity.

Session 5.
Handout 1.

WORLD EDUCATION PLANNING MODEL* FOR TRAINING



* with appreciation to Linda Abrams, et al.

Session 5.
Handout 2.

NOTES ON STEPS IN THE PLANNING PROCESS

Plan and Carry Out:

1. *Needs Assessment:*

   - determine target population
   - determine problems of target population
   - prioritize problems to be attacked
   - assess available resources
   - review what's available
   - involve the target group, if possible, in problem definition

2. *Specify Objectives:*

   - state in terms of what is to be accomplished
   - state who is to accomplish it
   - state time the task is to be completed by
   - state the conditions under which the objective is to be met
   - involve the target group, if possible, in setting the objectives

3. *Design Activities:*

   - design activities that will ensure each objective is met
   - sequence the activities from simple to complex
   - involve the audience as much as possible during activities
   - develop activities appropriate for the experience level of your group

4. *Evaluation:*

   - assess the effectiveness of your project at the three levels addressed above: accuracy of needs assessment information, realistic objectives, appropriateness of activities/materials
   - involve audience in evaluating your project in terms of meeting their needs, usefulness, learning, etc.

Session 5.
Handout 3. L.N. Davis. *Planning Conducting, Evaluating Workshops*. Austin, Texas: Learning Concepts, 1974, pp. 52-66.

THE COMPETENCY MODEL METHOD

Developing a competency model (also known as a behavioral model) is the first step in this method. Subsequent steps lead to a specification of what needs to be learned to meet the standard of the model. The needs are then ranked in order of priority.

This method is not primarily concerned with what is wrong, but with what is possible. As such it lends itself to the pursuit of new opportunities. Of the two methods it is perhaps the easier to work with. It has both individual and organizational uses.

Process steps

1. Developing a Competency Model
2. Discovering Present Levels of Performance
3. Specifying Needs
4. Separating Learning from Nonlearning Needs
5. Assigning Priorities
6. Testing Commitment

Process Description

1. Developing a Competency Model

Your first task is to develop a model for desirable or required competencies. As used here, *competency* means sufficient knowledge and ability to meet and succeed in the necessities of living. (Competencies are also called *behaviors*.) Such models range from the simple (one or two competencies required to perform a single task) to the complex (all the competencies required to fill a particular role or position).

In order to develop a model, you must clearly establish what behaviors are required. There are several ways to find out:

- consulting competent practitioners
- watching competent practitioners
- consulting relevant research
- conducting relevant research
- consulting supervisors
- reviewing job descriptions and performance standards
- conducting a task analysis
- asking prospective participants.

Opportunities occasionally call for models never seen before. In that event, you are forced to make an informed guess about the competencies required and try them out. But since there is seldom anything entirely new under the sun, you would be wise to exhaust the above resources first.

In stating competencies there is a tendency to be overly general, to state slogans instead. For example:

Competency Model for Supervisors

Overly general slogans	1. Leadership
	2. Dedication
	3. Communication

Often these are simply incomplete descriptions. For the above examples we might seek answers to questions such as the following:

Leadership

- what "style(s)" of leadership?
- as demonstrated by what?

Dedication

- to what?
- to whom?
- as demonstrated by what?

Communication

- with whom?
- in what language?
- does this mean:
  a. giving clear instructions?
  b. giving effective instructions?
  c. listening?
  d. listening and hearing?
  e. ability to give and receive criticism?
  f. ability to reach agreement?

There is also a tendency to state vague qualities, rather than competencies:

Competency Model for Supervisors (cont.)

	4.	Good character
	5.	Patience
Vague Qualities	6.	Motivation
	7.	Good appearance

This leads to several difficulties such as:

Who sets the standards?
How do you know they are being met?
How does one learn how to be that way?
Etc.

It also runs the danger of concealing biases about things such as short or long hair, short or long skirts, purple or green skin, etc.

Say What You Mean. It is a good practice to be as specific as possible instating competencies. Specifying the real-life application seems to be helpful. Also the use of sentences complete with nouns, verbs, and modifiers is recommended. Let's try to say a portion of what might have been meant by "leadership."

	1. A good line supervisor knows the three basic leadership "styles": authoritarian, democratic, and laissez faire.
Specific competency statements	2. A good line supervisor is competent in using all three styles.
	3. A good line supervisor knows which style is appropriate to the specific employee and the specific situation.

These are only samples; they are not prescriptions. Different models call for different formats. They are based on my experience and are written in my style. You will develop your own. You should strive, however, to say what you mean, to say things that have meaning to others, and to say them as completely as possible.

2. Discovering Present Levels of Performance

In this step we are trying to discover just how prospective participants are doing in relation to the model. There are several ways to go about it. Let's look at a few of them.

Reviewing personnel evaluations may provide some indication, but often they are too vague and too general to be of much use.

Reviewing reports may yield data on behaviors in real life situations but tend to gloss over the problems.

Asking supervisors can provide valuable information if the supervisor is objective, observant, and willing to level.

Testing participants is problematic since most canned tests measure aptitude rather than behavior. Written tests tend to measure reading, writing, and parroting abilities. Tests may be perceived as threatening or insulting.

Having participants try it is interesting. This usually takes the form of having participants try out the behavior in a situation that simulates real life conditions. Examples include case studies, mini-cases, role plays, dry runs, social simulations, etc. (see Methods Primer, Chapter 4). This is, to be sure, a form of testing, but since it is closer to life there is usually less resistance. It is also a much better measure of present performance.

Observing participant behavior in real life situations is obviously the best measure. The difficulty lies in isolating a particular behavior for observation and in deciding whether inadequate behavior is due to a lack of competency or to other variables such as poor supervision. Most real life situations are too complex for this direct approach.

Asking participants may yield mixed results. Asking is not necessarily receiving; you may get a silly answer or none. Much depends on the level of trust established by the educator and by the environment. There are also difficulties in objectivity and precision. Still this method often yields the most valuable and accurate data when there is an adequate format for the answer (see p. 66 for example format).

There are pitfalls in all these methods. Sometimes it is helpful to use more than one. Choose your method(s) to fit the situation, but whichever you choose, don't get hung up in a quest for precision. Present methodology is incapable of it. Besides, the focus here is on reaching the desired behavior, not on documenting deviation from it. Leave that to the academicians.

3. Specifying Needs

Once the present level of performance has been determined, your task is to describe what is needed for participants to reach the desired level of the model. This is made considerable easier if you have been specific in developing the model. Using the previous example of supervisory leadership competencies, assume that you discovered that a particular supervisor 1) knew the three basic leadership styles and 2) knew their appropriate uses. By the simple method of asking him, you also discovered that he felt uncomfortable in using the authoritarian style even when appropriate and was to that degree ineffective as a supervisor. His need *is to be able to use the authoritarian style effectively.*

4. Separating Learning from Nonlearning Needs

This step is not as essential as in the problem analysis method of needs assessment, but it occasionally serves a purpose. Continuing with the previous example, assume that upon further discussion with this particular supervisor you found that his discomfort came from two sources.

A. His boss maintained an open-door policy. When the supervisor employed the authoritarian style, his boss undercut it by listening to and sympathizing with the complaints of certain employees.

B. Like most of us, the supervisor wanted to be liked. Consequently his authoritarian style was limited to thin, hollow demands which, when ignored, led to outbursts of ineffectual anger.

In this case the open door problem is not a learning need for the supervisor. His weak authoritarian style is a learning need and suggests a learning experience in assertive behavior most likely employing role play. (The new behavior, however, is not likely to last if the boss doesn't close his door.)

Other situations might reveal the need for supportive management systems or for new and better tools, both nonlearning needs. Let me stress, however, that in using the competency model method you are not primarily concerned with the causes of inadequate behavior but with the specific learning required to reach the desirable behavior. Most often you can simply specify the difference and get on with the learning.

NOTE: If you failed to get rid of those vague qualities (good appearance,etc.) earlier, now is the time to toss them out, or you will find yourself in the untenable position of designing learning activities to try to reach them. (An exception might be made for stewardess training, but in that case good appearance would become specific things like acceptable hair styles, make-up, etc.)

5. Assigning Priorities

The competency model method has the advantage of suggesting a logical learning sequence leading from simple to more complex behaviors. Obviously such a sequence has implications for priority setting.

Also involved in assigning priorities are such factors as organizational needs, timing, relative cost, etc... These factors often rule out behavior changes that are extremely difficult to achieve.

6. Testing Commitment

Following the previous example, you must find out if the supervisor will attempt the learning and if his boss will support it. If they are only mildly interested in the change, then a fruitless workshop is likely to occur and it is better to abort the mission.

Suggestions for Application

The competency model method is well suited for assessing individual learning needs. It may also be adapted for organizations or parts of them when desirable competencies are common to all involved.

There is an interesting spin-off application for the competency model itself. In organizational settings, it can be used verbatim as the basis for a performance evaluation system. This coupling of staff development and staff evaluation strengthens both.

Advantages to Competency Model Method

- Leads to an organized sequence of learnings
- Provides a complete set of learnings necessary for a particular job or role
- Provides a standard of behavior for any particular job or role
- Provides a convenient basis for designing orientation or basic training (new employees have not yet encountered problems)
- Is more adaptable (than problem analysis) to individual needs and individual pacing

Disadvantages to Competency Model Method

- Requires the relative continuity of both participants and educator
- Does not lead to immediate problem solution
- Requires a great deal of background information about behaviors required in meeting the model

Competency Model Worksheet

The following worksheet is provided for your use in conducting a competency model needs assessment. It is designed to be completed by participants if a democratic approach to needs assessment is used. When participants have individually completed the worksheet, you may use a separate worksheet to record the group averages and construct a group profile. The worksheet containing group data then becomes the first sheet in the *Workshop Staff Packet*. The *Group* item is for describing the participant group.

In order to make clearer the use of this worksheet, I will describe the options for use in each step of the competency model needs assessment.

1. ***Developing a Competency Model*** (refer to Step One in text)

   Once the competencies required for the particular role (or task) have been specified, they are entered in the column designated *Desired Competencies*. This may be done by you or by participants working from a master list. The space designated *Competency Model for* is used to describe the role or task for which the model is constructed.

2. ***Discovering Present Levels of Performance*** (refer to Step Two in text)
   When you are assessing participant competencies without consulting participants, you may complete the worksheet for individuals or the group as a whole based on whatever data you are using. When participants are asked to self-assess, they are provided with individual copies of the worksheet. A space is provided at the top left for their names. If the democratic approach is used, first have each participant complete the worksheet independently. You may then share with him other relevant data, such as supervisory assessments. Participants are then allowed the opportunity to revise their self-assessments if they desire. The notes at the bottom of the worksheet are provided as directions for participants in self-assessing.

   The assessment scale presented here differs from those commonly used in rating performance. Despite the negative implication, I believe this (-,+) rating scale to be more honest and adult than a sequence of positive numbers. It also aids in discrimination by forcing a choice between adequate and inadequate performance levels. In the directions, participants are asked to construct a profile by connecting the circled numbers with solid lines. At the completion of learning activities, they may self-assess again, connecting the new circled numbers with dotted lines. Comparison between the solid profile and the dotted one graphically reflects progress. In cases where continued growth is both desirable and possible, you may want to extend the scale to (-5,+5) or even (-9,+9).

3. ***Specifying Needs***

   The prospective adult learner is usually far better than anyone else at pinpointing exactly what he needs to learn in order to raise his performance to expected levels. Whatever approach you choose, the *Needs Learning* column is provided for recording this data.

4. ***Separating Learning from Nonlearning Needs***

   Again, the emphasis here is not on problem analysis. However, it may be clear that once a particular learning need has been met, other kinds of change or support will be required if the new behavior is to be used in real life. The *Nonlearning* need column is provided to record such data.

5. ***Assigning Priorities***

   The column indicated by "#" is reserved for the priority ranking. In arriving at group rankings, a simple average of individual rankings may produce unsatisfactory results if the average cancels out extreme needs. You might choose instead to arrive at a group ranking by giving a "1" to the competency receiving the largest number of individual "1" rankings, a "2" to the competency receiving the second largest number of "1" rankings, and so on. Another alternative is to have participants use their individual rankings as a basis for making decisions by consensus.

Only learning needs receive a priority ranking; related nonlearning needs take the same ranking.

6. ***Testing Commitment***

The worksheet containing group averages and the group profile is used in checking with both management and participants for commitment.

In addition to the worksheet itself, I have provided a sample of a partially completed worksheet based on the example found in the text.

NEEDS ASSESSMENT: COMPETENCY MODEL

Name:	Group:

Competency Model for:

Desired (required) Competencies	Performance Assessment Scale		Needs		
	Inadequate	Adequate	Learning	#	Nonlearning
1.	(-) 3 2 1	(+) 1 2 3			
2.	3 2 1	1 2 3			
3.	3 2 1	1 2 3			
4.	3 2 1	1 2 3			
5.	3 2 1	1 2 3			
6.	3 2 1	1 2 3			
7.	3 2 1	1 2 3			
8.	3 2 1	1 2 3			
9.	3 2 1	1 2 3			
10.	3 2 1 (-)	1 2 3 (+)			

Directions: For each competency listed, circle the number that most accurately reflects your present level of performance. This is not an evaluation, but a tool to assist you in specifying your learning needs, so please be as honest as possible. Connect the circled numbers with solid lines. The pattern of these lines helps you see your strong and weak areas. For each negative number circled, describe in your own words what you think you need to learn to reach an adequate level of performance in that competency. If adequate performance, in your opinion, requires something in addition to what you will be learning, indicate this in the Nonlearning needs column. The column designated by (#) is for ranking your needs in priority order. Place a "1" by the need that is most important to you, a "2" by the next most important, etc.

NEEDS ASSESSMENT: COMPETENCY MODEL

Name: Tim Meek	Group: Line Supervisors, Operations

Competency Model for:

Line Supervision (Leadership)

Desired (required) Competencies	Performance Assessment Scale		Needs		
	Inadequate	Adequate	Learning	#	Nonlearning
1. A good line supervisor knows the three basic leadership styles; authoritarian, democratic, and laissez faire.	(-) 3 2 1	(+) 1 2 3		3	
2. A good line supervisor is competent in using all three styles.	3 2 1	1 2 3	Need to use the authoritarian style effectively. (assertive behavior)	1	Boss needs to close door.
3. A good line supervisor knows which style is appropriate to the specific employee and the specific situation.	3 2 1	1 2 3		2	
4.	3 2 1	1 2 3			
5.	3 2 1	1 2 3			
6.	3 2 1	1 2 3			
7.	3 2 1	1 2 3			
8.	3 2 1	1 2 3			
9.	3 2 1	1 2 3			
10.	3 2 1	1 2 3			

Directions: For each competency listed, circle the number that most accurately reflects your present level of performance. This is not an evaluation, but a tool to assist you in specifying your learning needs, so please be as honest as possible. Connect the circle numbers with solid lines. The pattern of these lines helps you see your strong and weak areas. For each negative number circled, describe in your own words what you think you need to learn to reach an adequate level of performance in that competency. If adequate performance, in your opinion, requires something in addition to what you will be learning, indicate this in the Nonlearning needs column. The column designated by (#) is for ranking your needs in priority order. Place a "1" by the need that is most important to you, a "2" by the next most important, etc.

Session 5.
Handout 4. Davis. *Planning, Conducting, Evaluating Workshops.* pp. 40-47.

THE PROBLEM ANALYSIS METHOD

With this method a problem statement is the starting point, followed by a systematic process of moving from the problem statement to a series of learning needs that are then ranked in order of priority. It has both individual and organizational uses.

Process Steps

1. Stating the problem(s)
2. Refining the problem statement
3. Supporting the problem statement
4. Finding the needs
5. Separating learning from nonlearning needs
6. Assigning priorities
7. Testing commitment

Process Description

1. Stating the Problem(s)

   A problem (or perhaps more than one) is stated. We then probe to see if it is really the statement of a problem. There is a common human tendency to state a solution when a problem is called for.

   Example: Question: "What is the problem?"
   Solution: "They need motivation training."
   Probe: "Why? What's happening? Describe it."
   Problem: "They're always late for work."
   (See *The Case of the Pokey Elevators,* p. 49.)

2. Refining the Problem Statement
   In the step above, there is a correctly stated problem, but is it the problem you should attack? Often there is a more fundamental problem than the one initially stated. Continuing our previous example:

   Problem: "They're always late for work."
   Clarifying probe: "You mean they don't get their work done on time?"
   Denial: "Oh no. *We* always meet *our* deadlines!"
   Clarifying probe: "You mean they do sloppy work, then?"
   Denial: "Good lord, no! *We* turn out the best work in the whole place!"
   Shift question: "Well then, what is the problem with their being late to work?"
   New problem: "My boss came through the shop at 8:00 sharp the other morning, and only 2 people were here."

   Larger problems must often be broken into their component parts in order to work with them. The kind of probing demonstrated above my also be used for this purpose.

3. Supporting the Problem Statement
   So far you have only a statement that someone has *called* a problem; you should make certain it isn't a crank call. There must be evidence to support the allegation. There are numerous ways to get this evidence. Here are a few of them.
   a. Ask how often the problem occurs.
   b. Ask for specific examples or incidents.
   c. Have the situation role-played.
   d. Ask some other people.

e. Check organizational records and reports.
f. Ask how many people are affected.
g. Go see for yourself.

4. Finding the Needs

There is now a correctly stated problem apparently important enough to be solved. It is time to determine what *needs* to happen to solve it. Solutions often require several changes, and there are normally several possible change combinations. Exactly *who* needs to learn exactly what? Are new tools needed, new decisions required, structural modifications necessary? The process of arriving at a solution can range from selecting the best of several common sense proposals to constructing models of possible cause/effect chains and computer testing for feasibility.

5. Separating Learning from Nonlearning Needs

The needs list must be divided into those needs that can be taken care of by someone learning something and those that have to be solved in some other way. The need for adequate equipment is not a learning need; the proper use of equipment is. Here are some more examples:

Learning Needs	*Nonlearning Needs*
decision making skills	need for a decision
use of forms	need for new forms
following directions	too many bosses
organizing work	too little time
communication skills	bottlenecks
safety habits	unsafe conditions
achieving objectives	lack of objectives
greater productivity	inadequate salary
etc.	etc.

The above needs are related and interdependent. Often the nonlearning needs should be met before or concurrently with the learning needs. New behaviors are not likely to last if the environment does not support them.

6. Assigning Priorities

You now have before you your potential tasks, but since there is seldom enough time and money to go around, they should be ranked in priority order. The pattern of changes contained in the solution may suggest the priorities.

7. Testing Commitment

Finally, you must know whether anybody is committed to the solution. This amounts to finding our if anyone will attend and if the top people in the organization will support the solution.

Suggestions for Application

When working with groups in the Problem Analysis Method, brainstorming (a rapid-fire listing of problems without critique, see p. 134) is an effective technique for Step One. In the unlikely event that no one states a problem, you might begin with mini-cases (p. 137) or mini-role play (p. 142). These usually uncover some problems; if not, you have nothing more to do.

When working with organizations as a whole, starting with a simulation (p. 143) can be fun and lead to an active problem-stating session. A representative vertical cross section of the organization is required if it is impractical to involve the entire organization.

Advantages to Problem Analysis Method

- Groups may be either *ad hoc* or ongoing
- The educator may turn the data over to others to actually conduct the learning activities
- Requires little background in the indicated areas of learning need
- Leads to high learning motivation since learning activities are designed to solve immediate problems
- Leads to immediate satisfaction when problem is solved

Disadvantages to Problem Analysis Method

- Can lead to crisis planning
- Does not lead naturally to sequenced learning
- Does not reveal new opportunities for learning
- Does not provide a great deal of latitude for individual preferences of pacing
- Participants are often reluctant to admit that problems exist

Problem Analysis Worksheet

The following worksheet is provided for your use in recording the results of a problem analysis needs assessment. The title indicates that it becomes the first page of the *Workshop Staff Packet* when the workshop is based on the Problem Analysis Method of needs assessment. (If the Competency Model Method is used instead, then the alternate Worksheet One found later in this chapter becomes the first page of the packet.)

The space designated by the word *Group* is for describing the group (or groups) from which the data came. Each problem statement emerging from Step Three of the procedure should be entered in one of the spaces provided. Separate columns are provided for the leaning and nonlearning needs that fall under each problem statement. If related, they may be listed across from each other. Smaller vertical columns are provided for the priority numbers. The number sequence may include all the needs on the worksheet, or the needs under each problem may be sequenced separately.

WORKSHEET 1

NEEDS ASSESSMENT PROBLEM ANALYSIS

Name:			
Supported by data:			
Learning		Nonlearning	
Priority #:		Priority #:	
Supported by data:			
Learning		Nonlearning	
Priority #:		Priority #:	
Supported by data:			
Learning		Nonlearning	
Priority #:		Priority #:	
Supported by data:			
Learning		Nonlearning	
Priority #:		Priority #:	

Session 5.
Handout 5.

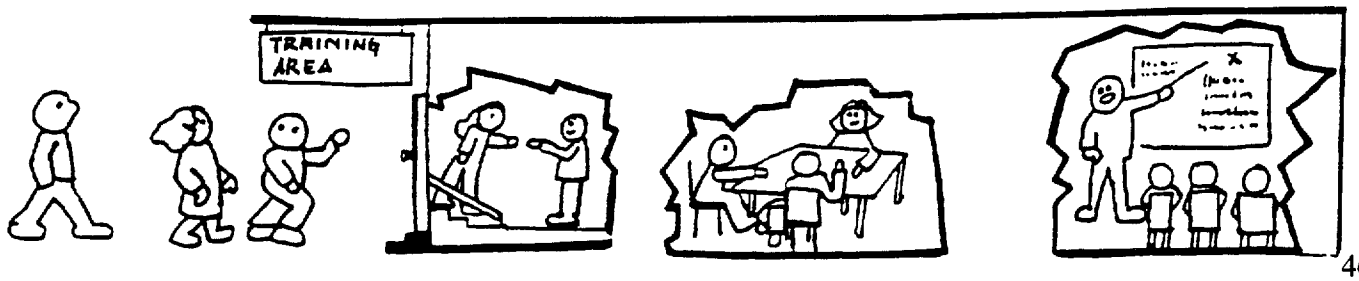
STEP ONE: Which areas are most important? 31 different areas of skill and knowledge are listed below. Please review the list and then place a check in the parentheses next to the 10 areas which seem most essential to your group's progress. Then go on to step two.

STEP TWO: How well are you doing? Now please rate your group's present level of skill or knowledge in all 31 areas. Think of the capability of the group overall, for each area, and ask yourself whether it is adequate to meet the group's goals and objectives. In the blank provided, write any number from 1 to 4:

1 = inadequate
2 = less than adequate
3 = adequate
4 = better than adequate

Check 10 — Rate all 31

1. ( )____ Fund raising and budgeting
2. ( )____ Information about how the government works
3. ( )____ Ways to stay in touch with community needs and preferences
4. ( )____ Recruiting and maintaining membership
5. ( )____ Goal-setting methods
6. ( )____ How to influence legislation
7. ( )____ Group process and interpersonal relations
8. ( )____ Discussion methods for groups to explore social problems, personal beliefs, etc.
9. ( )____ Planning and implementing special projects
10. ( )____ How to hold officials or agencies accountable
11. ( )____ Decision making and conflict resolution
12. ( )____ Knowledge of global issues (resource shortages, environmental crises, food, etc.) and possible local responses
13. ( )____ Management of volunteers
14. ( )____ Technical content of the group's field
15. ( )____ Ways to promote local decision making in technology and economics
16. ( )____ Holding effective meetings
17. ( )____ Knowledge of organizing strategies (understanding different approaches to social action; building effective campaigns)
18. ( )____ Problem solving methods
19. ( )____ How to develop alternative or community-based programs
20. ( )____ Methods for gathering factual information and survey data
21. ( )____ Ways of sharing skills and information, especially with new members
22. ( )____ Understanding the social and economic roots of problems, applying this knowledge when developing goals and projects
23. ( )____ Designing mechanisms for effective citizen participation
24. ( )____ Long-range community planning; envisioning "alternative futures"
25. ( )____ Knowledge about the role or mandate of your citizen board or citizen group
26. ( )____ Understanding the economics and politics of social services
27. ( )____ How to set up an appropriate organizational structure with a clear designation of roles and responsibilities
28. ( )____ How to run public relations or mass media campaigns
29. ( )____ How to acquire more power; how to increase the group's influence over important decisions
30. ( )____ Monitoring and evaluating program performance
31. ( )____ Providing citizens/volunteers with important and responsible tasks, plus the information and training needed to accomplish these tasks
32. ( )____ other
33. ( )____ other
34. ( )____ other



DAY 2

SESSION 6. APPROACHES TO NEEDS ASSESSMENT

LEARNING OBJECTIVES:

By the end of this session, participants will have increased understanding of several approaches to needs assessment. Participants will have applied those basic approaches in the development of one needs assessment tool.

MATERIALS:

- Worksheet 1, Role Play Scenarios - Assessing Learners' Needs
- Worksheet 2, Participants as Experts Exercise

TIME: 3 hours

ACTIVITIES

PART A: 1 hour 30 minutes

Step 1: Introduction to step one of the Training Model - Needs Assessment. Use a lecturette/large group discussion format to review participant response to each of the following questions related to the planning of training. After collecting participant's response, clarify and/or and new or additional information.

- What is a need?
- What is assessment?
- What is the purpose?
- Who wants to know what for what purpose?

Review major points of each approach - Task Analysis, Problem Identification, Topic Selection. Discuss participants' questions, from previous night's reading of handouts.

Step 2: Introduction to activity. In a large group discuss participants' ideas about the following:

- Do you think villagers are aware of their problems?
- If they are not aware of some problems, then are these problems real?
- What does it mean to say someone has a problem but isn't aware of it?
- Who determines when a problem is a real problem?

Step 3: Role play preparation. Set up a role play situation between two small groups, one representing villagers, the other representing urban health development workers. The job of the development workers is to explain to the villagers what they (the health team) think the villagers' main problems are and how they might be solved. The villagers should respond to these ideas and suggestions, offering their own analysis of their problems. Give each group a description of their roles. Then, each group prepares for the role play on its own.

Step 4: Ask members who are not in the role play to be observers. Divide these observers into two groups, one to record the views of the villagers and one to record the views of the health workers.

Step 5: Implement role play. After allowing sufficient time, stop the role play and discuss what transpired.

Step 6: Process.

a. Ask each observer-group to read its list of ideas, those expressed by the "villagers," and those expressed by the "health development workers." Ask them to discuss what they have learned about real villagers from this activity. What would they have to do to really understand villagers' attitudes? (reflection/discussion/analysis)

b. Ask participants what they learned about villagers' needs regarding: (insight/discovery)

- problems
- potential training topics
- potential "activity" or "task" analysis and villagers' strengths

c. Summarize by asking the group what they learned through this activity. (insight/discovery)

d. Ask the group to list new questions this activity generated? (questions/setting objectives/planning)

PART B: 1 hour 30 minutes

Step 1: Introduce activity. Ask each person to make a list in answer to the following questions:

- What would you need to know from or about learners in order to design a training program for them?

- What would you need to know from or about learners in order to create problem solving materials or activities?

Step 2: Divide participants into small groups. Select a volunteer facilitator for each group. Then, discuss and combine the participants' lists into one master list.

Examples:
- current practices
- needs
- level of knowledge
- interests
- traditions and customs
- working vocabulary
- problems of daily life
- religious and cultural norms
- work tasks

Step 3: Distribute Worksheet 2, Participants as Experts. Ask participants to write down the master list in Column 1 and, then, follow these instructions:

Please fill in the other columns now.

In Column 2: how much do you know about each of the items listed in Column 1? *a lot, a little, almost nothing (in terms of the community they work in)*

In Column 3: give examples for how you came to know what you know: *reading and study, observation, investigation (surveys and interviews), personal experience*

In Column 4: put a check mark next to items that you wold like to know more about.

In Column 5: next to checked items, please specify how you could begin to investigate the topic you want to know more about.

Step 4: Use a large group discussion to summarize these two activities. Use this list as a basis for planning your community needs assessment activities later.

Session 6.
Worksheet 1.

ROLE PLAYS - NEEDS ASSESSMENT

Role for Villagers

You are happy with your life in Mamituto, where you and your ancestors have lived in relative peace and quiet, and with little interference from the government for most of your lives. You realize that the village has its problems, but you don't think that you are any worse off than any of the other villages in the region. You have enough to eat and God has provided you with ample children to work the rich land, which rewards you for your work.

You are particularly pleased with some recent improvements in the village, especially water which has just been piped in from a site some five kilometers away. Your village has just hired a female teacher, which means that more girls are now attending school.

When informed of the pending visit by the MOPH, you held a village council meeting and decided that you would meet with the staff from the MOPH health program although you are not interested in building a clinic in your village. You have heard that the nearest village with a clinic has had all kinds of maintenance problems with its clinic and you don't want to be bothered. However, you have identified some health problems such as diarrhea in young children and dizziness and vomiting among the farmers.

Roles for Health Development Workers

You are either college educated health professionals or have attended a technical training school. You were recently appointed to work with the Ministry of Public Health's Village Health Promotion Programme. Your job includes initial visits to villages to make people more aware of their health problems and to try to interest them in working with the MOPH in a clinic construction project. For each village you visit, the MOPH supplies you with the results of a baseline survey which was conducted three years ago.

The baseline survey conducted of Mamituto showed the following information:

- infant mortality rate is high, particularly for diseases which are preventable;
- immunization rate is low, especially for measles;
- there is no potable water in the village; women must walk four km for fresh water;
- the birth rate for the village is high, over 3% in the past five years;
- less than 20% of the girls in the village are in school;
- usage of the nearest clinic is very low for Mamituto residents.

Session 6.
Worksheet 2.

PARTICIPANTS AS EXPERTS EXERCISE

Consensus list	I know....	How I know...	I would like to know more about	How I can learn more

SESSION 7. SETTING GOALS AND OBJECTIVES

LEARNING OBJECTIVES:

By the end of the session, participants will be able to arrange goals and objectives by level and specificity. Participants will assess a list of objectives according to criteria for writing behavioral objectives. Participants will apply basic criteria for writing goals and objectives given hypothetical needs assessment information for an activity design.

MATERIALS:

- Handout 1, Setting Goals and Objectives
- Worksheet 1, Writing Behavioral Objectives
- Worksheet 2, Envelope Exercise

TIME: 3 hours

ACTIVITIES

Step 1: Give a lecturette (using Handout 1 as your background information). Allow for questions and provide answers. The major points which you should include are:

- purpose for setting goals and objectives
- criteria for learning objectives versus goals
- examples of learning objectives
- evaluation of learning through objectives

Pass out Handout 1 for participants to review.

Step 2: Conduct the envelope exercise. Give each participant an envelope with the goals and objectives which have been cut in strips inside (be sure to cut the numbers off each of the strips). Ask participants to order goals and objectives by level/specificity and in sequence. When completed, give each participant a copy of Worksheet 2 to check her own work. Allow time for questions. Then, critique with participants some examples of behavioral objectives from Worksheet 2.

Step 3: Explain rules to behavioral objectives, taken from Worksheet 1, Writing Behavioral Objectives, and provide examples as necessary.

Step 4: As a large group brainstorm a list of action verbs. Review list. In small groups, ask participants to complete two tasks:

a. Categorize action verbs according to the following:
   - Knowledge
   - Skills/Practice
   - Attitudes

b. Within each of those categories, review the verbs and sequence them according to levels of difficulty. Participants should try to find examples for the different levels. Trainers can select a few categories from the list below.

   - Knowledge: Knowledge (cognitive), Comprehension, Application, Analysis, Synthesis, Evaluation

   - Attitudes: Receiving, Responding, Valuing, Organization, Characterization

   - Practice: Perception, Guided Response, Mechanism, Complex Overt Response, Adaptation, Origination

Review the following points:

- Trainers can write objectives that measure performance from different levels.

- Reminder: It is important to sequence participants' learning from basic to more complex. Use your needs assessment information to help you determine at what level to set the objectives.

Step 5: Review Needs Assessment and Goal Setting. Point back to the model and explain that in tomorrow's sessions the group will begin activity design.

As our end of day evaluation exercise, ask participants to go around in a circle and complete the following sentence:

I am feeling ... because ...

Once that is completed, go around the circle again and ask participants to complete the following sentence:

The most important thing I learned today was ...

Then, go around the circle one last time and ask participants to complete this sentence:

I am confused about ...

Session 7.
Handout 1.

SETTING GOALS AND OBJECTIVES

Goals and objectives are based on information collected during the assessment of needs, resources, and constraints. While the primary focus should be objectives for trainees accomplishment, the organizational and training context must also be considered. For example, trainees may express a need to learn the use of media equipment - projectors, slide-tape, etc... but the organization may have determined that funds will not be available to provide this equipment. If possible, preliminary goals and objectives should be established after an initial needs assessment and then checked with a sample of trainees and representatives of the sponsoring organization before proceeding with a more detailed design.

Setting goals and objectives for training is a critical step in design because they:

1. Set general directions for training and the effective use of resources.

2. Can be shared with trainees, other trainers, and representatives of the sponsoring organization to clarify the purpose of training and gain general support.

3. Will suggest learning strategies and activities for use in training, thus simplifying later steps of the design process.

4. Will suggest evaluation strategies.

5. Will assist in sequencing training activities - moving step-by-step from simple to complex objectives.

Since training is usually short-term and focused on skills, attitudes, and knowledge related to trainees' tasks and jobs, training objectives should be as job-related and realistic as possible. A good training program will provide learning that can be used immediately by the trainees. This is in contrast to a four-year college degree program where there may be a long delay in applying what has been learned.

The level of specificity and complexity of objectives should be determined by deciding what will be most <u>useful</u> to trainees, their organization, and trainers. For most training purposes, goals and objectives are divided into the following three levels:

Level I - Goals

Goals are general statements of purpose (what is wanted). They should capture the spirit of the program. Everyone involved in the training should be able to agree with and support

the goals. For example, an overall goal of a training program for midwives might be to increase the midwives ability to motivate new acceptors into the family planning program. The goal gives the program an overall direction and, thus, guides the trainers in setting the general and learning objectives.

Level II - General Objectives

The major difference between general objectives at this level and learning objectives at Level III below is one of degree. General objectives are more specific than the goal statements, but not as specific as the learning objectives. Usually a goal is broken down into several general objectives and a general objective is broken down into several learning objectives. Thus, a general objective represents a topic area and a greater amount of training time than a learning objective. Verbs chosen for this level of objective would then suggest a more encompassing and complex set of actions than learning objectives below. (See examples used in Envelope Exercise in this session.)

Level III - Learning Objectives

Learning objectives are specific statements of the performance expected of trainees. In comparison to general objectives above, they are more specific and require less time to complete. However, in order to complete one general objective, several learning objectives have to be met first.

A good learning (behavioral) objective should include the following components:

1. What the learner should be able to do - emphasizing action verbs and observable behaviors.

2. How well the learner (trainee) should be able to do the action (performance criteria or the evaluative component).

3. Under what conditions the learner will perform.

At times, it may not be practical or necessary to include information that describes numbers two and three above. If you choose not to, then, you should know why. The main purpose of the objectives is to describe what the trainee will be able to do once she achieves the objectives. For examples, refer to Envelope Exercise in this session.

Linda Abrams and Nanette Brey Magnani

Session 7.
Worksheet 1.

WRITING
BEHAVIORAL OBJECTIVES

by: Nanette Brey Magnani, Ed.D.

World Education, Inc., 1992

Introduction

This exercise is an introduction to identifying and writing behavioral objectives. Your ability to write behavioral objectives will assist you in designing educational activities for community members.

Rules of Behavioral Objective

Writing objectives is easy when taken step by step. The first rule is simply that the participants are the subject of the sentence. The second rule states that the sentence contains an action verb which describes observable, measurable action, so that the objective is clear as possible. Examples of action verbs include **demonstrate**, **write**, **interpret**, **describe**, **invent** and **identify**. Examples of nonaction verbs include **know**, **understand** and **have**.

Utilizing the above information, read the sentence below. Circle YES if the statement follows rules 1 and 2, and NO if the statement violates rules 1 or 2.

The participants will know the steps in doing a feasibility study.

YES NO

If your answer is YES, turn to page 62.

If your answer is NO, turn to page 64.

Your sentence should be worded similarly to the following sentences:

1. The participants will be able to identify the steps in doing a feasibility study.

2. The participants will describe the steps in doing a feasibility study.

Both these sentences follow rules 1 and 2. The participants are the subject of the sentence and an action verb has been used; therefore, it has the potential to be measurable. For example, one can observe or measure participants identifying these steps in various types of activities, such as, checklists, listings or discussion.

Please continue reading on page 59.

The third rule for writing behavioral objectives is as follows: The sentence describes what the participant should be able to do under certain conditions. For example, a given time period such as one week, three months, two years, or following a visit or in a specific context such as a role play.

This example includes two types of conditions - time and context. By the end of three sessions, the mothers will demonstrate new steps in ORT preparation by mixing the ingredients. That sentence is a behavioral objective because it satisfies three rules:

1. The participants (in this case, the mothers) are the subject of the sentence.

2. The sentence contains an action verb that is observable or measurable.

3. The sentence designates under what conditions.

Read the following statements and circle YES if the statement is a behavioral objective, and NO if the statement violates rules 1, 2 or 3.

By the completion of training, the informal leaders will state the basic principles of the Juhudi Credit Scheme during a practice presentation.

YES NO

If YES, turn to page 63.

If NO, turn to page 66.

No, the statement is not a behavioral objective because it violates the second rule. The verb "will know" is not an action verb, therefore, not measurable. If the sentence read,

> By completing simple calculations, entrepreneurs will demonstrate their ability to add and subtract.

then the statement would be a behavioral objective.

Please proceed ahead to page 62.

If you answered YES, you are partially correct. The statement does follow the first rule because the participants are the subject of the statement; however, it violates the second rule. The verb "will know" is not an action verb, and cannot be clearly measured. Proceed to page 64.

If you answered NO, you are absolutely correct. The sentence is not a behavioral objective, because it violated rule 2. "Will know" is not an action verb, and therefore, is not measurable. The verb (to) demonstrate or apply would have been a better choice.

Read the sentences below and once again write YES if the statement is a behavioral objective, and NO if the statement is not a behavioral objective. However, this time if the statement is not a behavioral objective, circle the number(s) of the rule(s) it violates. Check your answers on page 65.

Briefly, the rules are as follows:

1. The participants are the subject.
2. An action verb is used.
3. Conditions are specified.
4. There is an indication of how well the learner should be able to do the action.

1. After several exercises on nutrition, the mothers will successfully differentiate between all healthy and unhealthy foods for infants and toddlers on the list.

YES _____ NO _____

2. To inventory food, drinks, and other for their businesses by the end of training.

YES _____ NO _____

3. Trainer Matatu will know the proper way to change motorcycle tires.

YES _____ NO _____

4. Following a site visit, the credit officers will understand what his/her job is.

YES _____ NO _____

5. After inservice training, participants will identify his/her responsibilities by correctly listing 7 out of 8.

YES _____ NO _____

If you answered YES, you are correct. The statement is a behavioral objective, because it follows three rules. Read the next statement and circle YES or NO if the statement is a behavioral objective.

Upon completion of simple calculations, entrepreneurs will know how to use a check book.

YES NO

If YES, turn back to page 60.
If NO, turn back to page 62.

If you answered NO, you are correct. The statement is not stated in behavioral terms. The statement follows the first rule because the participants are the subject; however, the second rule has been violated. The verb "will know" is not an action verb, and therefore, cannot be clearly measured. Rewrite the sentence utilizing an action verb. (The participants will understand steps in doing a feasibility study.)

Turn back to page 58 to check your sentences with the examples.

ANSWERS

1. Yes, the sentence is a behavioral objective because it satisfies all four rules.

2. No, the sentence is not a behavioral objective because it violates rules 1 and 2. The business owners are not the subject of the sentence. There is no indication of performance standard. Rewrite the sentence in the space provided below, so that is reads correctly.

3. No, the sentence violates all the rules. The participants are not the subject; the verb is not measurable, conditions have not been specified, and "a proper way" is too vague as a performance standards. Rewrite the sentence using an action verb in the space provided below.

4. No, the sentence is not a behavioral objective because it violates rules 2 and 4. An action verb has not been used and, therefore, is not observable or measurable. No performance standard had been indicated. Rewrite the sentence using an action verb in the space provided below.

5. Yes, the sentence is a behavioral objective because it satisfies all 4 rules.

Sorry, the statement is a behavioral objective because it follows the three rules thus far described. Turn back to page 59, reread the second paragraph and answer again.

Session 7.
Worksheet 2.

ENVELOPE EXERCISE

Goal:

To increase the midwives ability to motivate new acceptors to join the family planning program.

General Objective 1:

The participants will be able to apply basic strategies, approaches and techniques when recruiting new people to accept family planning practices.

Learning Objectives:

1. Given a variety of scenarios, participants will list reasons why different families choose or do not choose to accept family planning methods.

2. With the same scenarios, the participants will be able to assess the role of the midwife by defining the steps she took to motivate the families to accept family planning.

3. In a series of role plays, the participants will demonstrate behaviors that reflect an informal approach versus a formal approach to contacting and convincing the target audience to accept family planning.

4. Following a lecture on additional strategies, approaches and techniques such as methods of identifying informal leaders and the uses of satisfied acceptor approach, participants will know how to apply such approaches in their communities. Each participant will be expected to list those strategies, approaches, and techniques that would be most appropriate to try in her community and give an explanation why.

General Objective 2:

The participants will demonstrate a basic understanding of several types of family planning methods and the effects of each on the acceptor(s).

Learning Objectives:

1. Participants will be able to understand in detail at least five family planning methods, three of which are the most popular methods chosen by acceptors.

2. In a role play, participants will be able to state correctly the effects that each of the five different methods described above have on the person who takes or uses the method.

General Objective 3:

Participants will develop relationships with community members that reflect mutual respect.

Learning Objectives:

1. Participants will have the opportunity to explore how they feel toward acceptors and non-acceptors and why.

2. Given their above feelings, the participants will list those feelings that help them to be respected in the community and, therefore to do their job better, and those that do not.

3. Using their lists of negative feelings, participants will define what they will try to do to overcome their negative feelings.

General Objective 4:

The participants will be able to develop a plan of action to follow when recruiting new acceptors.

Learning Objectives:

1. Given basic statistical information on participants' respective communities and an assessment of past experience, participants will be able to set realistic targets for recruiting new members.

2. Given an explanation and an example of a simple time line model, the participants will be able to complete a plan of action by listing their major tasks related to recruitment efforts, by determining how long each task will take and who will do it, and by deciding when each task should be done. Each participant will be expected to incorporate at least two new approaches and/or techniques she learned during the training program.

DAY 3.

SESSION 8. ACTIVITY DESIGN AND IMPLEMENTATION

LEARNING OBJECTIVES:

By the end of the session, participants will generate a list of training methods based on training thus far and from their own personal experience. Participants will also be able to describe at least two different learning activities for each of five learning objectives provided to them. In addition, participants will be able to list at least five variables to consider when selecting training methods for designing learning activities.

MATERIALS:

- Handout 1, Groups of Methods
- Handout 2, What to Consider When Selecting Teaching Methods - Checklist of Variables

TIME: About 2 hours

ACTIVITY

Step 1: Introduce the next step in the Training Design Model - Activity Design. In a large group discuss the importance of activity design. To start discussion, begin by posing the following question:

What does it mean to create an environment which promotes learning?

Gather participant response, making notes on either a flipchart or on the blackboard. Then, review the following definitions with the participants:

- *Learning activity:* a specified from of action in which learning is occurring toward a desired end. Some of the learning can be observed; some of it cannot be.

- *Role of the trainer:* to design learning activities in which the participants will engage in to meet the learning objectives and, then, to facilitate or lead the activity.

- *Passive learning activities:* those activities in which the learner cannot be observed to be actively engaged in learning, but is "acted upon."

- *Active learning activities:* those activities that engage the learner in processing information, solving problems, practicing skills.

Step 2: Explain the concepts of "process" (how) and "content" (what). Then, ask the large group to brainstorm a list of the techniques used thus far in training. Use the following diagram to record their responses.

process	content
(technique/method)	(topic)

Then, next to each technique ask participants to state what content or information they learned as a result of the process which was used.

Step 3: Brainstorm a list of methods in addition to the above list that participants are familiar with. Pose the question: What ways have _____ (Kenyans, Chinese, etc.) used traditionally to pass on their traditions, history, or other learnings from one generation to the next? Add these responses to the list.

Step 4: Handout 1, Groups of Methods. Read the handout with the participants. Then, poll the number and names of people who feel comfortable with each of the identified techniques listed. Write persons names next to them.

Step 5: Ask participants to describe the audiences they will be designing educational activities for. List characteristics on flip chart paper. Then ask what other variables does a trainer need to consider when designing learning activities? Add these suggestions to the list.

Pass out and review Handout 2.

Step 6: Review Session. As a summary or evaluation activity,

- have participants explain distinction between process/content;
- have participants name 5 methods.

Session 8.
Handout 1.

GROUPS OF METHODS

Group 1: Information presentation methods:
longer readings, panel discussion, debates, audiovisual materials, etc.

Group 2: Skill practice methods:
problem sets, in-basket exercises, apprenticeships, drill, coaching.

Group 3: Process-knowledge methods:
step-by-step instructions, checklists, worksheets, planning guides, demonstrations, etc.

Group 4: Simulation techniques:
role plays, problem scenarios, simulation games.

Group 5: Process observation methods:
stop-action, fishbowl, etc.

Group 6: Discussion methods:
guided discussion, option lists, case studies, quick discussion techniques.

Group 7: Problem-solving and creative thinking methods:
brainstorm, consultation, etc.

D. Dale with D. Magnani and R. Miller. Beyond Experts - A Guide for Citizen Group Training. Amherst, MA: University of Massachusetts. 1979, p. 53.

Session 8.
Handout 2.

WHAT TO CONSIDER WHEN SELECTING TEACHING METHODS

CHECKLIST OF VARIABLES

The type of teaching/learning method that you choose depends, to a greater or lesser extent, on the following variables:

Audience:
size
age
previous experience with methods
background experiences - work, formal and nonformal education
homogeneity

Adult educator:
personal skills
training style
comfort with audience
comfort with content

Overall program:
how training fits into broader educational context
type of learning objectives
time available - length of program and session
nature of content - degree of depth
nature of process - degree of skill
pacing and sequence
degree of variety
logistics and resources
variety
setting

Nanette Brey Magnani

SESSION 9: DEVELOPING COMMUNICATION SKILLS

LEARNING OBJECTIVE:

By the end of the session, participants will have improved their skills in giving and receiving feedback through practicing active listening and feedback skills.

MATERIALS:

- Worksheet 1, Role Plays - Creating Dialogue
- Handout 2, Basic Principles of Giving and Receiving Feedback

TIME: 1 hour 15 minutes

ACTIVITIES

Step 1: (30 min.) Before the session starts, select four participants to conduct two short role plays (see Worksheet 1 for the role play scenarios).

Step 2: Prepare the large group for the two role plays. Tell them that in each role play a health educator is meeting with a community member. They should watch what each person does and says carefully, as the group will want to discuss the results later.

Step 3: Conduct each of the role plays.

Step 4: As a follow-up discussion, ask group members who were not in the role play the following:

- Describe what you saw in the first role play.
- Describe what you saw in the second role play.
- What was different about the two role plays?
- Which role play described one-way communication; which one described two-way communication?
- Which type of communication is best for establishing dialogue?

Step 5: (30 min.) Skill development: active listening, paraphrasing, and giving and receiving feedback. Review Handout 1 and review it with them. Explain the four roles: speaker, listener, observer, feedback giver. Ask the participants which role they are more comfortable in, and why? Then ask participants which role they may be the least comfortable in, and why?

Session 9.
Handout 1.

BASIC PRINCIPLES OF FEEDBACK

Giving Feedback

- Describe behavior, make observations.
- Be specific.
- Share ideas and alternatives.
- Be timely (as soon after the act as possible).
- Be careful of amount of information given so that the person can hear what you are saying.
- Focus on what is said, not motives for saying and doing it.

Receiving Feedback

- Appreciate someone taking the time to talk with you.
- Clarify your understanding of what is being said.
- Remember: once you receive the feedback, then you can decide on an appropriate response.
- Don't be defensive.

Session 9.
Handout 1.

ROLE PLAY SCENARIOS

Scenario 1.

You are a health educator meeting with a mother who has several children with very bad diarrhea. You believe the mother hasn't been following the ORT (oral rehydration therapy) instructions so you begin to explain the steps again. While you are doing this, the mother tries to interrupt you, but you ignore her and continue. The mother tries again to say something but you just continue you with your "speech." The mother gives up and pretends to listen.

Scenario 2.

You are a health educator meeting with a mother who has several children with very bad diarrhea. You know the mother attended a health education lesson at the clinic. You ask her if she has tried giving her children ORT (oral rehydration therapy). After she speaks you want to find out if she remembers the specific ORS instruction. So, you ask her to show you how she has mixed the ORS.

SESSION 10. PRACTICUM I - METHODS

LEARNING OBJECTIVES:

By the end of the session. participants will demonstrate their ability to us one training method in a small group setting developed on the basis of existing training methods and materials.

MATERIALS:

- Handout 1, Brainstorm
- Handout 2, List of Brainstorm Situations
- Worksheet 1, Observation/Feedback Form

TIME: 2 hours 30 minutes

ACTIVITY

Step 1: Divide large group into small groups with approximately 5 participants in each group for Practicum I. Participants will be expected to practice the brainstorm technique for implementation later in the afternoon. Review the rules for the use of the brainstorm technique. Pass out Handout 1, Brainstorm.

Tasks:

1. Provide participants with descriptions of situations related to their own experiences that would be suitable for using the brainstorm technique.

2. Each situation poses questions that would elicit a "brainstormed" response from a group of workshop participants.

3. Review the rules and procedures for a brainstorm.

Step 2: Participants will be expected to practice the brainstorming technique in their small group. Provide participants with flip chart paper with the chard below already written out on it. For purposes of practicing in the smaller groups, ask participants to sign up once as a trainer and once as an observer.

Sign-Up Sheet Group #____

Time Slot	Trainer/	Observer	Names
1st			
2nd			
3rd			
4th			
5th			

Step 3: Position each group in a corner of the room or in separate breakout areas if possible. Plan 10 minutes for practice with the technique and 5 minutes for feedback from each observer. Give each participant a copy of the Observation/Feedback Form and review.

Step 4: Each group then does as many brainstorms practices as there are group members and feedback activities. Once this is completed, bring all of the groups back together.

Step 5: In a large group, discuss participants' reactions to their experience, (a) in using the brainstorm and (b) in providing and receiving feedback. Ask questions such as:

- How did it go?
- How did you feel?
- What were the similarities? What were the differences?
- Did your questions get the kind of response you were hoping for? Why? or why not? Ask for examples of questions.
- In what ways do you think you will be able to use brainstorming?

The trainers should then give comments regarding what they observed and heard in the small group sessions.

Session 10.
Handout 1.

BRAINSTORMING

Purpose: To elicit a wide range of ideas and information from participants. To tap the experience and expertise of the participants.

Description: This is a technique to encourage active and imaginative input form participants. The facilitator's role is to encourage all participants to say the first thing that comes to their minds about a specific topic and to keep ideas flowing quickly. Brainstorming is used to help focus or clarify activities or a content area. This technique also promotes creativity and finding solutions to problems. Brainstorming is particularly effective in opening sessions to establish goals, objectives, expectations and norms (rules) for the training program.

Process:

1. Trainer tells the group that the purpose of the exercise is to elicit as many ideas as possible about a specific topic.

2. Participants are invited to offer as many ideas as they can about the topic being investigated. They are asked to draw upon personal experience and opinion and to be creative and imaginative. (At this point, no ideas are rejected or analyzed - everything which is offered is accepted and encouraged.)

3. Trainer writes all ideas down on newsprint or a chalkboard so that all participants can see.

4. After participants' ideas are gathered, the group discusses and analyzes the information which was collected. At this time, the trainer can ask each person to clarify points they have made that are unclear to the group.

5. Trainer then helps participants group and prioritize the ideas on the flip chart. This can be done by consensus, vote, or compromise.

6. Through this process of prioritization, the trainer helps the group identify key ideas for the group to pursue or further investigate.

Note: The trainer should make sure that ideas generated during the brainstorm are used. If ideas have not been used, it may leave the participants feeling as if they have wasted their time.

Session 10.
Worksheet 1.

OBSERVATION/FEEDBACK FORM

BRAINSTORM

	Comments	
	Strengths	**Needs Improvement**
Trainer		
• Overall presentation		
• Comfort with:		
▼ participants		
▼ technique		
▼ content		
• Style		
• Clarity		
▼ explaining directions		
▼ following procedure		
• Time		
▼ able to complete activity		
Evaluation		
• Objective met		
• Participant involvement		

One Problem, Two Views

TIME: ½ hr.

"The workshop was underway and we felt that the group had a good conceptual grasp of the problems that rural people face. We wanted to take the participants to the next level, that is, to be able to empathize with others, and to respect their difficulties and frustrations."

SETTING

Any quiet, large enough meeting place

MATERIALS

None

CONDUCTING THE ACTIVITY

STEP 1–Explain that the purpose of this activity is to gain a fuller understanding of some of the problems that rural, women face everyday, and to experience how they might feel when they cannot find help with these problems.

STEP 2–Ask the trainees to close their eyes and imagine that they have a son who has burned his hand so badly that he needs medical attention. Describe this event vividly, asking participants to create a mental image of the situation. How would they *feel* if such an event occurred? What would they do? Encourage an exchange of responses.

STEP 3–Ask group members to close their eyes again and imagine being a mother living in a village far away from the city. Again, the woman's son has burned his hand badly. But this time, there is no clinic, hospital, nurse, or doctor nearby.

STEP 3–Encourage the trainees to keep their eyes closed and describe how they *feel*. Then ask, "How would you handle this problem if you were this woman?"

WHAT HAPPENED

Trainees saw that a problem that in their experience could be dealt with relatively easily, might be baffling and even terrifying to a rural woman. This recognition highlighted a discussion of the difficulty and the importance of trying to understand the problems and frustrations of everyday life from the villagers' own points of view.

Taken from **From the Field.** World Education, 1977.

Field-tested by Patchanee Natpracha and Noreen Clark in Thailand.

SESSION 11. PRACTICUM II

LEARNING OBJECTIVE:

By the end of the session, participants will demonstrate their ability to use two different training methods in small group setting developed on the basis of existing methods and materials.

MATERIALS:

- Handout 1 Packet, Descriptions of Learning Activities
- Worksheet 1, Training Plan Format
- Worksheet 2, Observation/Feedback Form

TIME: 1 hour 15 minutes (Day 3)
3 hours 30 minutes (Day 4 for implementation)

ACTIVITIES

Step 1: Explain that you are going to hand out a packet of learning materials from other nonformal education programs conducted by World Education and other NGOs. Explain that these materials are relatively simple and easy to use. Each kind of material stresses learner participation, the use of group discussion techniques, value for the knowledge which adults bring to the learning activity, and active, rather than passive, learning. The packet includes story cards, case studies and role plays. Participants will be asked to review these and then adapt a portion of one of the materials to create a new learning activity. Provide, through discussions, an example of how these techniques are used.

Example: Use of role play or case story and picture cards:

- open-ended discussion
- close-ended discussion
- problem-posing
- stimulate interest
- develops creativity
- in conjunction with other techniques (puppets, skits, plays, stories)

Use of techniques for identifying with others (role play, imagination, simulations, plays):

- develop a greater empathy for other people's problems, situations
- stimulate interest
- develops creativity
- problem-posing

Step 2: Then form new work groups. In these groups, participants will develop a learning activity based on materials which they find in the packet. Give out Handout 1 Packet of materials. Explain that each group will have 30 minutes for delivery and 10 minutes for feedback. Thus, for some activities participants may have to select parts of an activity to do.

Step 3: Provide groups with a sign-up sheet (the same format as for Practicum I) to select time slots.

Step 4: Ask each group to review the Packet of Materials and decide which segment of the activity they will choose to do. Then, each group should complete Activity Sheet 2, Training Plan Format, in preparation for the implementation in the next session.

Evening: Small group preparation for training practicums.

DAY 4

Step 5: Explain the implementation of the training practicums. Explain that each group will have up to 30 minutes for its presentation and 10 minutes for observer feedback. Explain that all groups will present.

Trainer then provides summary of main points coming out of observation/feedback.

Picture Cards

Awareness-Building Lessons on Key Concepts in Health and Nutrition

Save the Children
48 Wilton Road
Westport, Ct. 06880
United State of America

Developed under a grant from
the U.S. Agency for International Development

By:
Russ Dilts

Production:
USPI/BPKB Jayagiri
Lembang, Bandung
Republik Indonesia
Illustration:
Irva Yudhantara

Breastmilk Baby Food

Weighing Healthy Child

Weight Card

Lesson 2.

PROFIT and LOSS

The goal of a business is to make a profit. However, in rural households, economic decisions are sometimes influenced by social obligations. The same thing can be true for group businesses — where members distribute some goods and services without payment in order to meet obligations to family and community. In addition, group members may be tempted by the short-term gains they can make for their own families from the business. Both cases will reduce the profits of the group business. The next two lessons will introduce the concepts of profit and loss, and illustrate the good and bad practices which may lead to one or the other.

MATERIAL: Newsprint, pens, tape, a set of profit and loss exercises for each participant

TIME: 2 hours

STEP 1: Open the session by asking participants the following questions:

- Why does anyone operate a business?
- What is profit?
- Can you give an example of making a profit?
- How do you make a profit?

STEP 2: Ask participants to decide whether the following statement is true or false:

"A business person has to spend money to make money"

Ask a volunteer to explain why she chose her answer.

STEP 3: Choose a sample business that is familiar to participants (i.e. poultry raising, a vegetable kiosk, or one of the businesses mentioned during the imagination exercise from Lesson 1). Brainstorm with participants the expenses for that business. List their responses.

STEP 4: Using the same business example, ask participants:

- What is the source of income for this business?
- Is this income the same as profit?
- What is the difference between income and profit?
- How can we know our profit?

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STEP 5: Present the following formula and ask participants to explain it:

Income - Expenses = Profit

STEP 6: Divide participants into small groups of 2 or 3. Give each group the profit and loss exercises to solve. Review answers with the whole group.

*(**Note to trainer**: If participants are mostly non-literate, present these exercises verbally. They may need to be simplified or you may want to provide each group with "pretend" money to help them figure the answers.)*

STEP 7: Explain that sometimes business owners act in ways that can reduce or increase their profit without realizing it. Ask participants to consider each of the following situations and decide whether the person is increasing profit or loss.

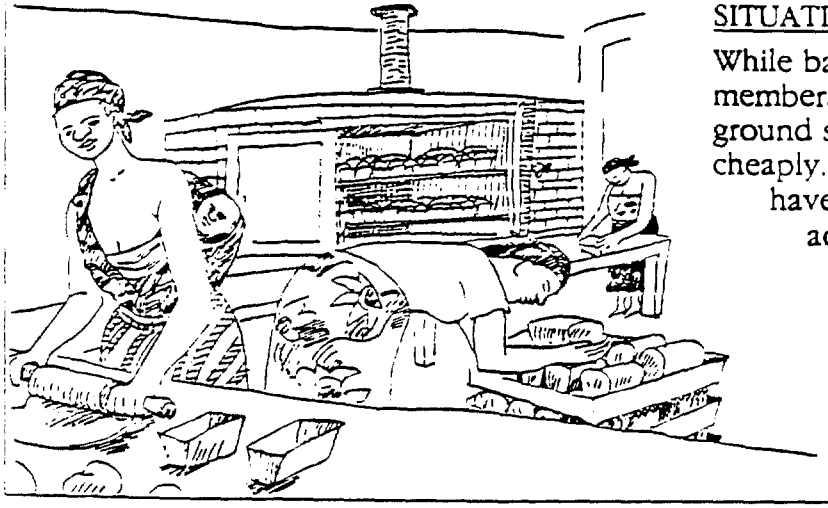
SITUATION 1

A kiosk owner sells vegetables, but she also gives them free to her relatives, neighbors, and friends. Whenever her mother visits the kiosk she gives her a few shillings from her sales money.

SITUATION 2

Ask participants to think about a privately-owned bus service and ask them to tell you whether or not the following actions will bring a profit or loss to the business:

- The driver lets his family ride for free.
- The bus is rented to carry a corpse to the mortuary.
- Police are paid a bribe by the driver.
- The local councillor pays for himself but not for the goods he carries.
- Tourists hire the bus to go on a safari.
- The driver siphons petrol from the tank and takes it home with him.
- The conductor buys a newspaper every morning with fare money.
- The bus breaks down and is mended for free by the owner's brother-in-law.



SITUATION 3

While baking bread for their group, some members deliberately drop the loaves on the ground so that they can buy the soiled loaves cheaply. Other members pretend that they have baked fewer loaves than they actually have, so that they can take some home with them. The group regularly gives the chief loaves of bread for free.

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SITUATION 4

Group members were given money to buy some goats. When they return, they report that they bought the goats at a high price and that the goats were lost on the way back. They actually hid them.

CONCLUSION: Conclude with the following questions:

Do you know any business owners or groups who do similar things?

How do you increase your business profits?

How will you know if your business is making a profit or a loss?

What have you learned from this exercise?

Does it apply to your work?

STEP 7: Explain that sometimes business owners act in ways that can reduce or increase their profit without realizing it. Ask participants to consider each of the following situations and decide whether the person is increasing profit or loss.

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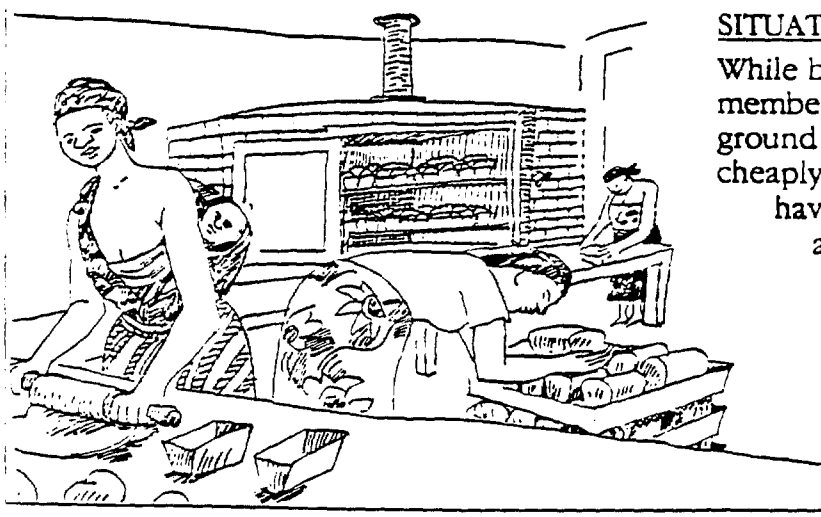

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How will you know if your business is making a profit or a loss?

What have you learned from this exercise?

Does it apply to your work?

Lesson 3.

CASH CONTROL

The careful control of business money is important for several reasons. It helps check unauthorised (or unwise) withdrawals of money from the business. It saves groups from the accusations and conflict which inevitably follow from poor business performance or suspicion of incorrect use of money. Cash control also guarantees a record of business performance which will help the group members make good business decisions. As such, cash control is an essential tool in increasing business profits and guarding against unnecessary losses.

MATERIAL: Newsprint, pens, tape, 2 case stories, handout of cash control tips for participants

TIME: 2 hours

STEP 1: Begin by brainstorming using the following questions:

- How is the cash managed in your group?
- At home do you manage money in the same way?
- Who should control group money?
- What problems might arise over money?

List all the main points raised.

STEP 2: Ask for 10 volunteers to act out a case story. Take them aside and help them decide how to present the first play. Present the role play.

STEP 3: Lead a short discussion focusing on the following questions:

- What did you see in this role play?
- Is this the right way to control money?
- Will it lead to profit or loss?
- Can you suggest any changes?

STEP 4: Repeat steps 2 and 3 using the second case story.

STEP 5: Go through the handout of cash control tips with participants. Check which of these tips participants' groups already follow.

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CONCLUSION: Does your group resemble the group in the first story or the second story?

Why is controlling cash important?

Who will benefit from this kind of cash control?

How will controlling cash affect the business?

Has this lesson suggested any changes you can introduce in your business?

CASH CONTROL: CASE STORIES

Case Story 1

A group of women began a poultry project so that they could sell eggs. Every day 2 women were in charge of collecting and selling the eggs. They gave credit to their friends and relatives without making any record. Sometimes they used sales money to buy soda for family visitors. The chairwoman, treasurer, and secretary took eggs without paying or making a record. The treasurer also collected the sales money without recording the amount. Sometimes she sent her sister to collect it for her. Sometimes no one came and the saleswomen took the money home with them. Sometimes it was lost or stolen before being handed over to the treasurer. One day the treasurer's husband borrowed the money she was keeping and none was left to buy feed for the layers the next day.

At their weekly meeting group members asked how much money the business was making. Neither the treasurer nor the secretary knew. Some members were very cross and left the meeting.

Case Story 2

A group of women decided to start a charcoal selling business. Before beginning they met to decide how to organize their business. They agreed to work in turns, 2 women selling charcoal every day. They also laid down a set of rules for controlling the money they made.

Whenever the women on duty sold charcoal to customers they kept a record of the sale. They only gave credit to other group members and kept a record when they did so. At the end of every day the treasurer came to collect money from the saleswomen. She checked the amount against their receipts and when the money was handed over they all signed a book to prove that the money had changed hands. On her way home the treasurer called on the group's secretary who checked the money and recorded the amount in the group's cash book. Twice a week they collected money from the treasurer's safe box and took it to the bank. At every group meeting they reported on the current cash in hand and at the end of every month they read a statement to the rest of the group summarising the income, expenses, profit, and bank deposits which they had made.

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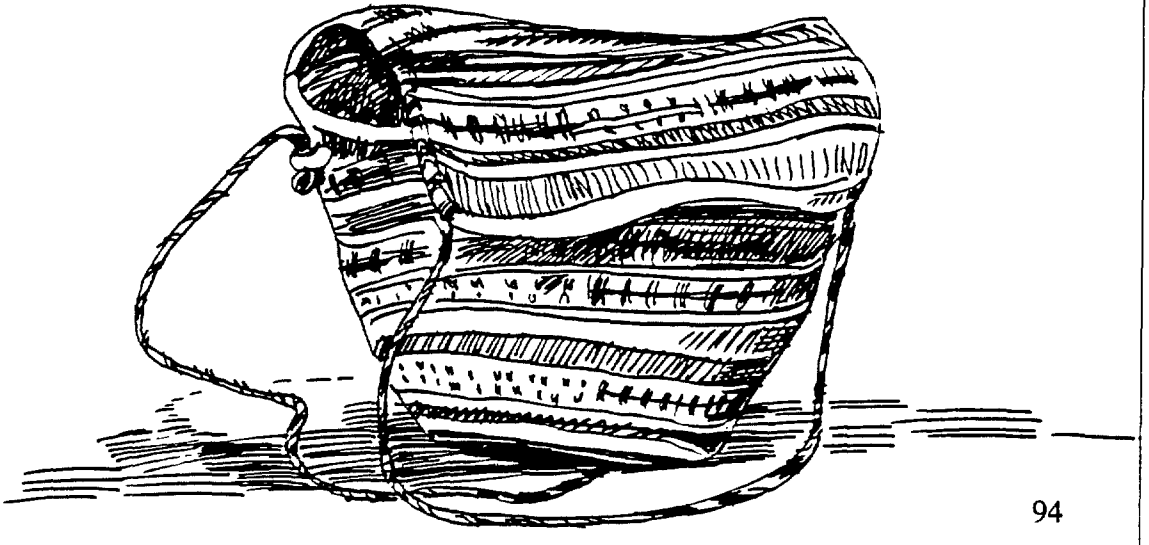
CASH CONTROL TIPS - HANDOUT

1. The bank account and the bookkeeping record should be reconciled monthly.
2. The secretary keeps a record of daily receipts and expenses in the cash book.
3. The treasurer comes in to check daily receipts. If the amount recorded agrees with the cash in hand, she collects the cash and signs for it.
4. The treasurer must always know how much cash she has.
5. Money is banked frequently. If possible, any cash in hand should be locked up by the treasurer.
6. Credit should not be allowed or kept to a minimum. Any sales on credit should be recorded and an invoice issued. All members should understand and agree on the credit policy.
7. Long standing debts should not be allowed.
8. Group money should not be withdrawn without group approval.
9. At the end of the month, the secretary and treasurer prepare a financial statement to be read to members. At every meeting they give the current cash position.



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TIME: 2 hours

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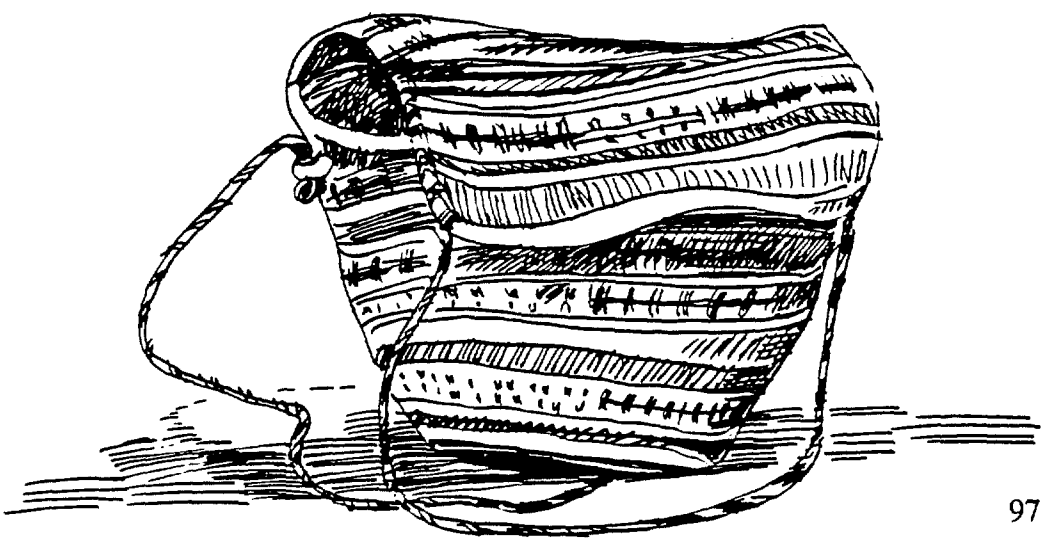

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Session 11.
Worksheet 1.

TRAINING PLAN FORMAT

Title:

Learning Objective(s):

Materials Needed:

Time:

Activities

Step 1:
(time)

Step 2:
(time)

Step 3:
(time)

Evaluation:
(What happened?)

SESSION 12: PRACTICUM III

LEARNING OBJECTIVE:

By the end of this session, participants will demonstrate their ability to design and implement a learning activity with a co-trainer.

MATERIALS:

- Handout 1, Descriptions of Training Techniques (from NFE Manual)
- Worksheet 1, Observation/Feedback Form
- Worksheet 2, Training Plan Format

TIME: 3 hours

ACTIVITY

Step 1: Provide participants with an overview of Practicum III. Explain that the purpose of this practicum is to give participants the time and the experience in working with a co-trainer and in developing his/her own learning activity. In this practicum, participants are encouraged to try one of three techniques: critical incidents, group discussion, role play. Provide each participant with a description of those techniques.

Reviews each of these techniques and describes how they can be used in combination or alone. For example, both critical incidents and role plays are used to stimulate group discussion. However, group discussion can be started by posing stimulating questions or using pictures. Stress the major differences between trainer lead discussions and participant lead discussions and how these differences impact on learner/participant motivation.

If participants are to lead their own small group discussions, then they also have to be aware of the role of discussion leaders. Ask participants: What is the role of the discussion leader? Collect participants responses on flip chart paper or chalk board. Possible responses are:

- guides the discussion
- keeps it going by knowing the subject well
- gives quiet encouragement
- does not force opinion on the group

- helps the group look at problem posed and discuss its causes and possible solutions and consider ways of selecting and bringing about the best solution
- others from facilitator behavior list?

If these responses don't come up the discussion, add them to the list as suggestions. Make sure that participants understand each response and accept its inclusion in the list. Ask clarification or need for additional discussion before going on to Step 2.

Step 2: Divide into groups of two and explain that the task over the next hour and a half is to have participants work in groups of two persons each to prepare a learning activity of their choice, but one which uses a critical incident, role play or small group discussion, or a combination of any of these. Explain that each group of two should use the training plan format that was used in the previous session as a way to organize their learning activity. Small groups then move into individual work spaces to prepare their learning activity.

Step 3: After 30-45 minutes, trainer should bring participants back together. Ask for volunteers to present their learning activities. Take two or three examples and discuss each one after it is completed.

Step 4: Trainer leads an overall summation of this activity before breaking. The summary should highlight process with content discussions playing a secondary role.

Buzz Sessions

Purpose: To allow people to discuss issues in small groups.

Description: Often during a training it is useful to work in small groups, so that each person has a chance to "talk through" a topic. Buzz sessions allow participants to become more actively involved in describing their opinions in small groups before bringing those ideas to the larger group.

Process:
1. The activity is introduced in the large group.
2. Participants are divided into groups of 3 or 4.
3. Each participant shares his or her view in the small group (and it is recorded).
4. Participants' views are consolidated within small groups and shared with the large group.

Case Studies

Purpose: To allow participants to analyze and discuss real or hypothetical situations they might encounter.

Description: A detailed description of an event, a case study encourages participants to identify alternative behaviors and solutions to situations and problems they might experience in the community. Topics such as health histories or stories of people with similar problems in other villages make ideal subjects for case study analysis. The trainer should design the case study activity so that it is relevant to participants, presented with interim reflection periods and discussed in small, logical segments.

Process:

1. Trainer writes or obtains appropriate case study focusing on the topic which is to be addressed.
2. Participants either break up into groups or work together in a seminar type discussion.
3. Analysis and solutions to problems in case study presented by participants.
4. Trainer facilitates questioning and approaches to alternative solutions.

Critical Incidents

Purpose: Same as Case Studies above.

Description: Similar to the Case Study, the critical incident describes a particular situation and is used to stimulate discussion. It differs from the case study in that it is a short paragraph which ends with a situation or question that requires an immediate response. Participants are encouraged to respond to the incident, take a stance they would defend, and discuss the range of action options with other participants.

Process: Same as Case Studies above.

Demonstrations

Purpose: To allow participants to witness a procedure or an act. The procedure can then be practiced by participants and supervised by the trainer.

Description: A demonstration brings to life some information that has been presented in a lecture, discussion, or explanation. For example, a discussion of a particular training technique may not be nearly as effective as a direct demonstration of that technique which participants can both experience and apply themselves.

Process:

1. Trainer explains the purpose of the demonstration.
2. Trainer demonstrates procedure or new behavior.
3. Participants ask questions, engage in discussion.
4. Participants practice with trainer/peer supervision.

Field Trips

Purpose: To allow participants to experience firsthand the topic of study.

Description: Field trips generally bring to life ideas that have been discussed and analyzed during the training. They allow participants to see real life applications of what is being studied. Field trips should be well planned and help stimulate the interest of the participants. The trainer should be aware of financial and time factors and coordinate field trips accordingly.

Process:

1. Participants are briefed on field trip - location, time and purpose of trip. Objectives for the trip are outlined.

2. Trainer (with the help of participants) may formulate a list of questions, observations, or considerations that the participants can use in their investigation.
3. Field trip is conducted - this may include escorts by community leaders and/or explanations by location specialists. Participants are encouraged to ask questions.
4. After field trip, participants are debriefed. The field trip is discussed and critiqued. Objectives are discussed and a question and answer period allows for participant interaction and sharing of ideas.

Fishbowl

Purpose: To provide participants with an active observation and analysis exercise that allows them to witness and critique a staged situation.

Description: A fishbowl situates a small group in the center of a larger group, allowing the outer group to observe and analyze the interactions of the inner group. Participants may observe a role play or an actual situation such as a discussion or a planning meeting. A fishbowl differs from a role play, which focuses on the feelings and reactions of the role playing participants, in that the focus is on the observation and feedback that is done by the outer group to the information supplied by the inner group. Situations might include interaction between administrators and community members, active listening or problem solving. The primary purpose is to practice observation skills and have the opportunity to give and receive feedback on content and interactions.

Process:

1. Trainer divides participants into inner and outer group.
2. Inner group openly discusses or acts out situation (developed by trainer or participants).
3. Persons in the inner group are active while the outer group listens and observes behavior. Specific observation roles may be assigned to outer group members.
4. Outer group gives feedback to inner group about what they saw.
5. Trainer facilitates analysis of behavior witnessed in inner group.

Games, Simulations, and Structured Experiences

Purpose: To allow participants to participate in a structured educational experience that approximates a real life problem or situation.

Description: Games, simulations and structured experiences take a great deal of planning and require a high degree of familiarity with the subject matter. A good structured experience has clearly stated learning objectives and a design that ensures that desired learning outcomes are achieved. Generally, games or simulations ease anxieties or fatigue and are

particularly effective when used at the end of a session or at the end of the day.

Making a game or designing a simulation or structured experience is a complex activity which requires much thought. At the very least, you must identify four basic components: a context (situation, game board...), players (how many, what type), rules (conditions and limitations), and an objective (skill, time, what should be achieved). With these in place you can refine the structured experience, pretest it with a small group, modify it, and use it with a group of participants as follows.

Process:

1. Trainer explains procedures involved in activity and hands out written rules if available (where appropriate, trainer demonstrates procedures).
2. Participants are encouraged to be spontaneous and have fun.
3. Game/simulation/structured experience is carried out.
4. Activity is analyzed and discussed.

Small Groups (Dyads, Triads, and More)

Purpose: To help share ideas and bring individuals together for discussion or problem solving.

Description: Grouping is an essential part of training and can be used by the trainer to either bring people together randomly, to have participants from the same community or region solve problems together, or to discuss opposing views or methods with colleagues. Optimum group size ranges from approximately two to seven, depending on the activity. The smaller the group, the greater the chance of individual participation.
The trainer may form groups by asking participants to choose partners or assign individuals to groups using a particular criteria (as suggested above). The trainer can use this technique for in-training participation or to establish working groups for outside training assignments.

Process:

1. One task is assigned to all groups or a different task is assigned to each individual group.
2. The purpose of the tasks is clearly stated and a time limit imposed.
3. How the group's work is to be presented is clearly defined and shared responsibility for presentation is given to all members of the group.
4. The task is carried out.
5. Presentations of results are made.

Ice Breaker

Purpose: To help participants feel at ease with each other and comfortable in the new learning environment; to encourage mutual trust.

Description: As its name implies, the ice breaker warms the learning environment to the point that the 'ice' keeping participants from interacting with each other is broken up. An ice breaker generally involves all participants in an active role. Ice breakers should be fun and attempt to create an initial bond between trainer and participants that can be strengthened during the rest of the training program. An example might be:

1. Randomly pair off participants.
2. Have participants work in pairs and find out as much about each other in five minutes as possible.
3. Each participant then introduces his partner to the rest of the group.

Other icebreakers include having participants: draw a picture which describes something about themselves and then describe it to the group; share a "nickname" they have been given sometime in the past; solve a puzzle together; or take a "blind walk" in which one person (whose eyes are closed) is led by a partner's verbal instructions.

Note: Since ice breakers can often incorporate games, unorthodox activities or close physical contact between participants, it is important to keep in mind what activity is most appropriate for the culture and context in which you are training.

Lecturettes

Purpose: To provide participants with specific information and/or set the stage for an experiential activity.

Description: Lecturettes are short forms of a lecture which are used to highlight key points of content. They differ from traditional lectures in that they often incorporate participant interaction and, at times, give the impression of a discussion. Useful as introductions to topics and 'lead ins' to experiential activities, lecturettes seldom last longer than 15 minutes.

Process:

1. Trainer prepares outline of lecturette and supporting instructional materials.
2. Key information is presented to participants.
3. Trainer solicits information and/or questions from participants.
4. Trainer allows discussion of unclear points.
5. Trainer summarizes, concludes and proceeds to next part of the session.

Panels

Purpose: To use outside "experts" to present or demonstrate new materials or ideas.

Description: Panel discussions often involve a facilitated debate and presentation on a given topic, followed by a question and answer period. Variations on this pattern that allow more open interaction between panel members and participants are possible and should be experimented with. Panels of experts can enhance the learning experience of the participants, give them access to active members of the community, and help participants to establish an information support network outside of the training program.

Process:

1. Objectives of having guest speakers are set.
2. Panel members are selected by trainer and/or participants.
3. Panel is invited to training session (guidelines and information is provided to panel members beforehand) and panel presentation takes place.
4. Participants are encouraged to ask questions or join in discussion.
5. Analysis and evaluation of panel presentation by participants is facilitated by trainer.

Peer Training

Purpose: To allow participants with expertise in a certain field to help in the training process and for participants to train each other.

Description: Peer training can help participants to network for future cooperation, collaboration and support in their community work. It takes the role of the "expert" away from the trainer and gives the authority and control of learning to the participants. Though rewarding, the preparation for peer training activities can be time-consuming.

Process:

1. Trainer solicits participant assistance in training in a particular field of study, asks for areas of expertise from participants, or assigns participants topics to be researched, prepared and presented.
2. Participants who wish to (or are assigned to) work with the trainer to design a training session and help conduct it.
3. Other participants are encouraged to ask questions and participate in discussions concerning the chosen topic area.

Popular Theatre and Puppetry

Purpose: To communicate information in an entertaining way that holds people's attention and encourages them to think about issues. Entertainment in the form of theatre and puppetry presentations offer people an opportunity to get together; including many who do not normally go to meetings or other training sessions. It can also develop leadership skills among the actors and others who plan the drama.

Description: Popular theatre (also called theater for development) is theatre by and for the people. By using costumes, the stage, masks and even puppets, people find ways to explore topics that they would otherwise be too afraid or embarrassed to discuss. They may take time to look at an unquestioned traditional practice in a new light if presented in an interesting, story form. Often through humor and fictitious situations, sensitive topics can begin to be considered and discussed. Usually this public play is planned an practiced in advance. Some parts may be memorized, but others may be open-ended, allowing actors to speak in their own words. In many cultures puppets are even more effective than live actors since their traditional characters can criticize what real people, even actors cannot. Vaccinations, the need to raise money for a community center, a new distance radio program, or family planning have all been topics of popular theater presentations.

Process:

1. A group decides to create a theatre production and generates some ideas on what it should be about.
2. They identify a topic, decide who the main characters will be and what they want the audience to learn from the production.
3. Next, the group draws upon personal experience to invent a convincing story that addresses local problems and they sketch the play out together (trying to involve humor, songs, dance and music when possible).
4. The group decides who will play which part and begins practicing.
5. A place is found to give the drama and a simple "stage area" is constructed and props and costumes (or puppets) are prepared.
6. The upcoming event is publicized.
7. The production is presented, soliciting participation from the audience.
8. Time is set aside immediately afterwards to discuss the drama with the spectators. Community "action plans" can be developed at this time.

Role Play

Purpose: To allow participants to practice learned behavior in new situations, act out real-life situations, and experience new perspectives.

Description: Roles may be set up by the trainer or participants may make up their own roles. Participants can thus explore solutions to situations or problems under discussion. Since this is a role play, discussion can center around the role and characterization presented by the participant and thus avoid criticism of the participants themselves. Role plays can be used in the large group or in smaller groups if appropriate.

Process:

1. Description of role play given orally or as a handout (developed by trainer or participants).
2. Participants of role play are given a time limit to prepare.
3. Participants act out role play as the character that they are portraying.
4. Trainer facilitates discussion/analysis of behavior portrayed or felt by participants.
5. Participants offer suggestions for changing their own behavior/attitudes.

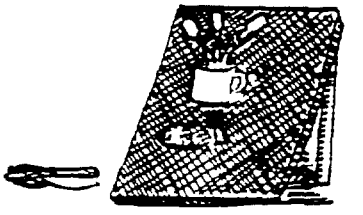
Instructional Support Materials

Type	Sample Applications	Supplies Needed to Produce
Chalkboards	Most all demonstrations and diagrams. Erasable.	Plywood and chalkboard paint. Chalk can also be produced from local resources
Posters, Flip charts, Diagrams, etc.	Permanent or mobile display such as steps in producing oral rehydration solution.	Produced from paper, white cardboard or cloth. Words can be imprinted using felt tip markers, homemade ink stains, or paint. Use different colors for visual effect and boards to rule straight lines.
Real objects	Identification of plants and pests, machinery, etc.	Plant specimens, used auto parts, objects from the environment.
Flannel boards	Displays requiring moveable items showing action or change.	Flannel cloth or wool. Pieces made from same material or similar rough cloth that will "stick" (burlap and flannel is a good combination). Cloth is attached to a base like stiff cardboard or plywood.
Games and Simulations	Active (fun) representation of real life activities	A range of materials, found and produced, dependant on type of activities (from game boards of wood and cardboard with markers, to costumes and verbal/written instructions).
Radio programs or Tapes (for audio presentation)	Updated practices and current events. Language dialogue review and oral history.	Simple radio and/or audiocassette player and recorder. Batteries or power outlet (if current is available). Tapes for recording.
Television, Film, VCRs	Presentation or production of recorded programs	Video Cassette Recorder (VCR) and/or camera unit, monitor, current; Film projector; Television and broadcast program from TV studio.

Flannel Board

Description and Use: The flannel board consists of a rough surfaced material attached to a board that serves as a background cloth for drawings, pictures, symbols, and captions. The display materials, backed with another rough surfaced material, adhere to the background with slight pressure and can easily be removed or rearranged on the flannel board. By sequentially adding prepared materials you can use the flannel board to develop concepts or illustrate processes. The flannel board is easy to transport and store. You can easily involve participants in preparing displays or reconstructing a process you have demonstrated.

Flannel Board Construction



Materials: a large sheet of plywood or heavy cardboard, a larger piece of flannel or rough cloth.

Procedure:

1. Take a large a piece of wood or heavy cardboard (participants will have difficulty seeing a small display from a distance) and cover entire board with flannel, blanket, or other rough cloth (note: the rougher the cloth used the better the board will work; smooth cloth may also be used if the surface is roughened with sandpaper).

2. Fasten the cloth to the board using tape, staples, tacks, or glue while running your hand across the cloth to create a smooth surface.

Suggestions: If possible use black, green, or grey color cloth (these are the most appropriate background colors and will offer good contrast). If a board is not available, the cloth may be clipped to or draped over a portable chalkboard or placed on a simple tripod.

Alternative Constructions

Elastic-backed cloth: Fasten elastic strips to the cloth so that it fits tightly around the board. This allows the cloth to be easily removed for storage.

Cloth bag flannel board: A two-sided cloth board can be made by sewing two pieces of cloth together in the form of a bag. Two different colors of cloth can be used to make a choice of background colors. To use, insert plywood, a chalkboard or heavy cardboard into the bag and pin the open end in place. Store display materials in the bag between uses.

Construction of Display Materials

Choose and cut out whatever materials you want to display: pictures, graphs, charts, etc. Cut-outs should be large so that learners can see them clearly. Simple brightly colored displays are more visually effective

than complicated, detailed pictures. Lettering should be bold. Figures in a story, for example, should be in proportion to each other, larger in the foreground, smaller in the background. Cut-outs and displays must be flat and rigid. Glue thin pictures or drawings onto cardboard and apply the backing material directly to the cardboard. Use sandpaper (in narrow strips) or rough cloth (over entire area) as backing materials. The display materials should adhere to easily to the flannel board when they are pressed firmly against it. Materials will stay in place better if the board is tipped slightly backward against a wall, chalkboard or easel.

Making Sandpaper

If sandpaper is not available, home-made sandpaper can be easily produced. Spread a thin layer of glue on cardboard, then sprinkle on a light covering of sand. Allow to dry and shake off excess sand.

Community Bulletin Board and Newsheets

Description and Use: A community bulletin board, placed in a strategic location, can be an effective way to encourage reading and keep people up to date on program and community news. Anything that can hold papers and be easily rearranged can serve as a bulletin board. Items can be hand written and changed every day. Use the board to challenge interaction: invite people to write short letters and respond to each other or post a local newspaper and encourage contributions. Use your community bulletin board in any one of the four traditional purposes: to inform, to motivate, to instruct, or simply to decorate. In general, bulletin boards are used because they are inexpensive and can be homemade from local materials and can be easily changed. In a classroom setting they provide visual stimulation to the learning environment and a focal point for learner participation and discussion. If you make them large and mobile, you can even use a bulletin board to divide your learning space for small group work and variety.

A modest mimeographed newsheet can keep people posted on upcoming events (see section on hand press duplicators for production ideas). A newsheet need be no more than a couple of pages and come out once a month or so. Invite people in the community (including children) to contribute articles and announcements. Encouraging participants to run a newspaper can build pride and a sense of community. Moreover, in areas where there are few books, a newsheet gives people a chance to practice, and thus retain, their literacy skills.

Bulletin Board Construction

Materials: A large piece of wood, cardboard, matting, etc.; paint or cloth (to accent or cover); fasteners (pins, thumbtacks, wire clips, etc.).

Procedure:

1. Paint the board a bright color or cover it with a bright solid color material.

2. Fasten the bulletin board to a wall or stand it on an easel (somewhere where it can be seen but not easily knocked over).

3. Organize the display materials and attach them in a clear and interesting fashion.

Suggestions: Many everyday materials can be turned into bulletin boards at little or no cost. A piece of cardboard box (carton), wood cartons (wooden boxes), heavy cloth material, heavy wrapping paper, woven mats or other low cost materials make excellent display areas. You can also cover part of the chalkboard with flannel or use the back of a door. A wire, strong cord, or even a slim bamboo pole stretched over part of a community room or through tree branches makes a functional bulletin board when materials are clipped to it.

Chalkboard

Description and Use: The chalkboard is a useful tool for any educational activity. It is easily used and reused and can be made large for facilitators or small for practice and use by individual learners (this is especially important where paper is less abundant). To use a chalkboard effectively:

- Print or write large.
- Face the group as much as possible, do not talk to the board.
- Do not fill the board with irrelevant material.
- Use the board to emphasize the important points by: drawing pictures, maps, diagrams or writing difficult words, lists, summaries, discussion questions etc. (being especially sensitive to the literacy level of your audience).
- Use the board to jot down ideas from a community discussion.
- Make sure participants understand what you have put on the board and why.
- Clean the board often (unless there is something you want saved for future reference).

Facilitators should be trained to use a chalkboard in an NFE environment. Without specific training, there is a tendency to revert to the familiar yet passive formal school uses. Encourage everyone to make use of the board. Learners or facilitators can outline reports to be compared, summarize research or group discussions, or draw pictures to illustrate a point. A more literate participant can be used as a secretary to write down the important points of a group discussion, or a story as it is created. The facilitator can then sit back and observe, actively participate or help learners check for mistakes (tactfully avoiding creating feelings of failure in front of the group).

Chalkboard Construction

Materials: piece of blockboard, plywood, or pieces of planks joined together; black paint or chalkboard paint (see below); sandpaper; chalk and cloth or eraser (duster).

Procedure:

1. Sand main board material carefully to an even roughness.

2. Apply two separate coats of black paint to roughened surface. Be sure the first coat of paint is dry before applying second coat.

3. Before using the chalkboard, rub a chalk-dusty eraser or cloth over it (this is necessary to create an erasable surface).

Suggestion: Attaching a good wooden frame to the board will help prevent warping and make the chalkboard last longer.

Alternative Construction-Cloth Chalkboard

This is a portable chalkboard that is light, easy to carry and can be used with small groups of learners.

Materials: canvas (55 x 74 cm); round wooden pole or stick; black paint.

Procedure:

1. Apply two coats of chalkboard paint or black paint, allowing first coat to dry thoroughly before applying second coat.

2. When paint is dry, fix a round, smooth wooden rod or pole to the long end of the painted cloth.

3. Connect both ends of the rod with a piece of cord or string so that you can hang it on a nail.

4. When rolling up the chalkboard, roll the painted side in keeping the unfinished surface on the outside.

Suggestions: If canvas is not available, use a smooth, thick piece of cotton cloth or old blanket. Give the cloth a very thin coat of (carpenters) glue on one side. When glue is dry, apply two coats of paint as above. Make a sturdier version of this chalkboard by attaching poles to both ends of the canvas and making two vertical support poles that, when placed between the top and bottom pole, stretch the canvas and create a firm writing surface.

Chalkboard Paint

Materials: 1 part soot or powdered charcoal; 1 part varnish; 1 1/2 parts of kerosene or paraffin.

Procedure:

1. Mix varnish and paraffin thoroughly.

2 Blend mixture thoroughly with soot or powdered charcoal.

3. Apply two coats of paint to prepared surface as described above.

Chalk

Materials: 1 part chalky soil or lime powder; 4 parts water.

Procedure:

1. Place chalky soil in a large basin or bucket.

2. Add water and stir vigorously. Crumble large pieces and dissolve soil as much as possible. Ignore hard rocks or pebbles.

3. Allow soil to settle overnight.

4. Pour water off the top and skim off top layer of silt (this is usually several inches thick). The top layer you have just skimmed off is chalk in a liquid state.

5. Put "chalk" in a bag of muslin or similar coarse, porous cloth and let it drip overnight. To speed process, the water may be squeezed out.

6. Roll chalk (which should now look like clay or bread dough) into long, snake-like pieces. Cut to desired lengths and let dry. Or split a reed stalk and use it as a chalk mold.

Suggestions: Thicker chalk will not break as easily. To make colored chalk, add dye (see this section) in step 2 above.

Layout

Layout refers to the arrangement and placement of materials within a defined area. It is one of the most important factors in a successful bulletin board, poster, newsheet, or any graphic medium. In general, you should balance the presentation of text and illustration so that the end result is easy to read and pleasing to look at. The final decision as to how to layout a given page, poster or board will generally depend on what is most pleasing to the individual's eyes. The following illustrations depict the same items laid out in three different ways.

4. Pour off liquid, scrape starch from the bottom of the container and set it in the sun to dry.

5. To make paste, mix some starch with cold water until quite thick. Next add boiling water, stirring constantly, until you reach the desired consistency for paste.

Paper Mache

Materials: newspaper or old thin paper stock and a paste mixture from above.

Procedures:

Sheet method: Soak a sheet of newspaper in a thin mixture of paste. When it is soft and pliable, lay it over the form to be covered. Let dry. Place at least six layers around a balloon or round object to make a ball. (Best method for making large objects.)

Pulp method: Tear newspaper into small pieces and soak these in water until they form a pulpy mass. Drain off the water and mix the paper thoroughly with thin paste. Apply by handfuls to the form to be covered. (Good for models, maps, etc.)

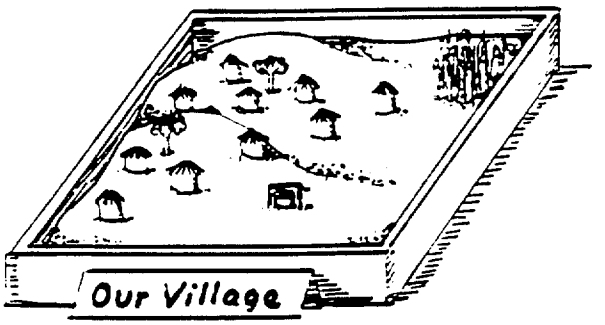
Strip method: Tear off thin strips of newspaper and soak them in thin paste until they are soft and pliable. Apply in criss-cross layers. (Best method for making puppets and animals.)

Models: Dioramas, Sand Tables and Salt Maps

Description and Use: Models are three-dimensional representations of a real thing. A model may be larger, smaller, or the same size as the object it represents. It may be complete in detail or simplified for instructional purposes. Use a model as an aid when discussing a situational analysis, trying to map out a village and potential locations of latrines, or practicing construction of mud stoves on a small scale. Also, learners can be actively involved in making models, whether it be creating a three dimensional map their community or making a model of a building they hope to construct.

If you are using a model for instructional purposes, familiarize yourself with it before you begin. Practice your presentation. If your model is a working one, be sure you know how it works. Be sure your audience does not get the wrong impression of the size, shape, or color of the real object if the model differs from it in these respects. Whenever feasible encourage learners to handle and manipulate the model.

Dioramas: A diorama is an open-sided box with flat background and trees, houses and ground constructed of paper or cardboard, painted and positioned in the box to present a three-dimensional display. It is a model that highlights features of a place, a particular scene, or village.



Sand Table: The sand table is exactly what the name implies: a table, or a floor in a corner of a room, with built up sides that contains sand or similar materials that can be molded to depict a particular scene. Small models can be created and easily moved from one spot to another on the sand table. The sand table has an advantage in that the sand can be smoothed out and used over and over again.

Salt Map: Similar to the sand table, but more permanent, is the salt map. The salt mixture can be molded into a rigid surface which can be painted, labeled and preserved over a long period of time. The ingredients of the salt map are: one cup flour, one cup salt and one-half cup water. When these ingredients are thoroughly mixed together they form a substance that can be molded, and when left to dry will harden. The salt 'map' has an unusual advantage in that it can be hung up when dry, providing three-dimensional pictures.

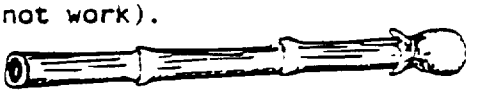
Pens and Paintbrushes

Description and Use: Pens, paintbrushes and markers can be made from a variety of indigenous materials. Sturdy, effective, and easily made, locally produced pens and brushes dipped in homemade dyes and inks can take the place of store-bought equivalents. Making your own writing implements can prove particularly important in areas where even the price of a pencil is a barrier to participation.

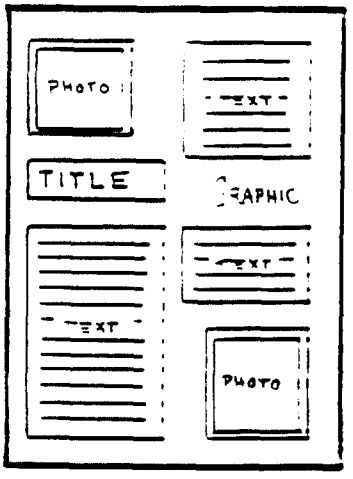
Pen Construction

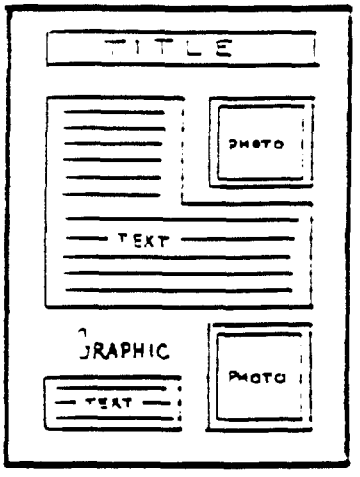
Materials: Thin, hollow bamboo is recommended for pen construction (large bamboo staffs will not work).

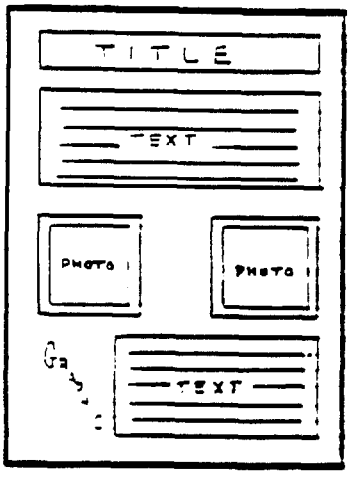
Pen Types and Procedures:



1. Bamboo Marker: Choose a 10 cm stick of bamboo (with an inside diameter approximately the same size as the desired line width), a wad of cotton (or any highly absorbent material), and small piece of loose-weave muslin. Compress cotton tightly and cover with muslin. Stuff into end of bamboo. Dip the cotton pen tip into an ink or dye and allow a reasonable amount to be absorbed. Wipe off excess and use it as you would a felt pen or magic marker. As the written image begins to lighten, dip the marker periodically in the ink or dye.







Posters

Description and Use: A good poster should catch and hold an individual's attention long enough to communicate a brief massage. To be effective, posters must be colorful and dynamic. If your message is clear and catchy, a poster can be an inexpensive and easily produced method of dissemination.

A poster was first used as a means of advertising over one hundred years ago to promote theatrical productions. Since that time, five key aspects of poster production have emerged. An effective poster is simple, has a single theme or topic, contains a concise, well-phrased message, and uses large bold letters and eye-catching colors. Good posters do not just happen, they are carefully planned. Posters rely on a symbol that expresses a particular set of ideas and is appropriate to the cultural and social context. The actual size of the poster, the lettering, and the coloring will all be influenced by where the poster is to be displayed.

Understanding how to use colors in posters is extremely important. Purple is the least visible color (by itself) while yellow has twelve times the visibility of purple. Orange, green, red, and blue are all roughly three times more visible than purple. Ultimately, complementary colors and contrasting shades create contrast and provide the most striking visual results. If, for example, you wish to create a poster to be viewed from a great distance, then you would use dark blue (or even dark purple) on a white background since this would result in the most visible lettering. Black on yellow, green on white, blue on white, green or red on yellow and red on white are also appropriate color combinations for distance viewing. (For general Layout information, see the section above.)

Puppets

Description and Use: The use of puppets is a well tried and valuable non-formal education technique. Puppets can take various forms from hand puppets, to stick, to marionettes. A puppet can be made to represent a character, a value, or a type of individual. Puppets serve as a safe and often culturally appropriate wall between learner's commentary on their world and possible repercussions (i.e. puppets may poke fun where people fear to tread).

Puppet Construction

Cloth and Envelope Hand Puppets- Materials: old socks, shirt sleeves, used envelopes, yarn, cornsilk, buttons, paint, glue, etc.

Procedure:

1. Draw, paint, glue or sew a face on one side of the cloth or envelope. Make the eyes a prominent feature. (Shape the envelope around the top edges of the face by folding and gluing the corners.)

2. Attach grass, cornsilk, strands of wool, yarn or rolled paper to serve as hair around the face, in back, and for a moustache or beard if desired.

3. Put the puppet head on one hand. You can use a rubber band or piece of string to secure it around the wrist.

4. To use the puppets have learners hide their bodies behind a cupboard, a desk, a large box or a fence and let the characters of their puppets take over.

Paper Mache Puppets- Materials: paper strips, paste, paint, etc.

Procedure:

1. Wrap a piece of dry paper around your index finger to make cone and paste it together.

2. Crumple a ball of dry paper and place it on the top of the cone.

3. Attach the ball to the cone using paper mache strips (see recipe for paper mache below), continuing until you have formed a secure, smooth surface.

4. Build up this surface with more strips to form features - ears, lips, nose, eyebrows.

5. When it dries, Paint it.

6. Cut a dress or shirt from an old scrap of cloth and sew it onto the head.

7. Bring the puppet to life by inserting your index finger in the hollow cone and using thumb and pinky as "hands" and use a desk, table or large box for the stage.

Suggestions: In many cultures, puppets have found a place in the festivities and leisure life of the community. Explore local techniques of puppet construction or invite a puppeteer to lead a construction session with participants.

Pastes and Paper Mache

Description and Use: The following mixtures are locally produced adhesives that can be used to fix paper and cloth items together, form maps or models, or otherwise help to create instructional support materials.

Paste

Flour Paste: from commercial wheat or cassava flour and water

1. Remove all lumps from the flour by sifting it through a wire sieve.

2. Add water as needed to the flour to form a smooth paste.

Suggestion: Insecticides may be added in areas where insects are a problem. (If insecticides are used, store well out of reach of children and avoid ingestion by anyone using paste.)

Rice Paste: from handful of rice and water

1. Cook rice in water (as usual) until rice is moist and sticky, do not allow rice to become dry.

2. Allow to cool and drain off any excess water.

3. Use the sticky rice as a paste, pressing out lumps with your finger as you apply it.

Cassava Paste: from 4 medium cassavas and cold water

1. Peel, wash and grate cassavas.

2. Add cold water, soak, and strain into another container. Squeeze out all liquid.

3. Let stand for one hour. Starch will settle to the bottom of the container.

2. Flat Stick Pen: For making letters you can wrap a small piece of felt over the end of a flat stick such as a tongue depressor and secure tightly with an elastic band. Dip into ink and begin lettering. This is good for drawing large and wide lines.

3. Bamboo Lettering Pen: Select a 12 cm stick of bamboo cane and use a knife or razor blade to carve an excellent lettering pen (as shown in the drawing). Be sure that the end is flat and even in thickness as this will affect the lettering you produce. Dip the pen in the ink periodically as you write.

Paint Brush Construction

Stick Brushes:

- Select or cut a six inch length of rattan or a dried reed-like plant. Mark it about one-half inch from one end and pound this section to form bristles.
- Use chew-sticks (used as a dental hygiene tool in many places) as cheap disposable brushes.
- Select bamboo sections, soak and chew the ends to make brushes for writing and painting.

Loose-Fiber Brushes:

Materials: Several large chicken or bird feathers tied together and trimmed to an appropriate length, or hair, string, fine grass, sisal fibers, etc.; gum or latex; bamboo or grooved stick; string or plaiting cotton.

Procedure:

1. Clean materials and gather them into small bundles according to how thick you want to make your brushes. Tie the materials firmly and cut level at the bottom.

2. Dip the level end in a waterproof gum or latex from a plant (such as a euphorbia hedge) or other source.

3. Stick the gummed end into a split bamboo, cut and grooved stick or onto a grooved bevelled stick. (It is better to fit the brush "in" something rather than "on" it. Bamboo is ideal for this purpose.)

4. The brush should be tightly bound onto or into the handle. Hair plaiting cotton or other small flexible fibers are ideal for this stage. A small amount of gum or latex over the binding will help to keep it from coming undone.

Inks, Dyes and Paints

Description and Use: The roots, leaves, barks, seeds and fruit of many plants and trees have been used for centuries to make colorants for crafts produced all over the world. These have been added to fixatives obtained from the gums of trees or made with starchy vegetables like maize or cassava flour. By following these age old techniques, you can identify appropriate and readily available materials for making your own dyes, paints and inks.

Ink

Materials: 22 cc alcohol (or methylated spirit); 14 cc water; 2 grams dry or powdered dye (of any color).

Procedure: Add all ingredients and stir well.

Dyes

Procedure:

1. Select a colorful plant leaf, bark, flower or seed.
2. Pound it well.
3. If color seems weak or plant produces little juice, add a bit of water, boil and let sit overnight.
4. Crush and press through cloth to strain.

Suggestion: Add a small amount of vinegar to help "fix" the dye when used.

Paints (Example: Cassava Finger Paint)

Materials:
- 1 cup of cassava starch
- 5 cups of water
- 1/2 to 1 cup of soap flakes (optional)
- color - made from leaves, bark, berries, foods, or crushed stone

Procedure:

1. Stir a little hot water into starch to remove lumps.
2. Add 5 cups of water to the smooth starch mixture and heat until clear and thick. Add soap flakes, if desired, and stir.
3. Stir in color. If more than one color is desired, separate mixture into several jars and add a different color to each jar.

Modeling Clay

Eight Ways of Making Modeling Clay

1. 1 cup flour, 1 cup salt, and 1/2 cup water. Mix until you get a modeling consistency.

2. Shred newspapers or paper towels. Mix with starch and any paste and knead thoroughly.

3. Mix cassava paste and sawdust. Add a little water if too dry.

4. Dissolve 250 ml of starch paste in water to thin slightly. Add 375 ml of plaster, 500 ml of sawdust, and knead to consistency of tough dough.

5. Soak small pieces of newspaper in bucket of water overnight. Remove from water and rub wet paper between palms of hands until it is ground to a pulp. Mix 1 ml of glue in 250 ml of water and add 500 ml of this paste to 1 litre of the wet paper pulp. Knead to a doughy consistency.

6. Mix 250 ml of dry clay powder and sifted through a screen with 5 ml of glue dissolved in 250 ml of water: add wet paper pulp and knead to a doughy consistency (add water as necessary).

7. Powder mud from an ant hill and mix with water.

8. Check to see if clay is available in your locality. You may only need to dig a pit.

Hand Press Duplicators

Description and Use: Hand press duplicators are simple, non-mechanized devices used to reproduce written and graphic images. The simplest is the hectograph which uses a gelatin pad to store an ink image and can transfer this image to paper up to 30 times. The mimeograph board produces a larger number of copies using store-bought stencils and ink, but requires no machinery or electricity to operate. The most versatile of these techniques is the silk screen press. Also referred to as a nylon duplicator or a limograph, this printing technique allows workbooks, newsheets, large posters, game boards, flags, shirts and other items to be produced in large quantities on different types of materials.

Hectograph

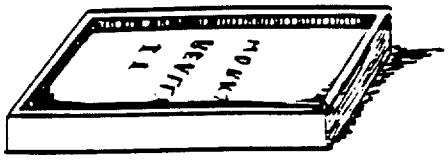
Materials: a flat pan, cookie sheet or wooden box (slightly larger than the paper to be used); ingredients from one of the four formulas listed (choose based on availability).

Formula 1
one box of gelatin
one pint of glycerin

Formula 2
1 part fish or animal glue (broken and soaked for 2 hours)
2 parts water
4 parts glycerin

Formula 3
glue (12 grams)
gelatin (2 grams)
water (7 1/2 grams)
sugar (2 grams)

Formula 4
gelatin (10 grams)
sugar (40 grams)
glycerin (120 grams)
barium sulfate (8 grams)



Procedure:

1. Choose a formula from above. If a glue based formula is used, let the glue sit broken in the water for 2 hours and then heat the mixture (in a can or pot) over or in a pot of boiling water until the glue is dissolved.

2. Add other ingredients and heat for 15 minutes (7 minutes for formula 1, plus skim any scum off the surface), stirring occasionally.

3. Pour this mixture into a flat shallow pan (straining it through a loosely woven cloth will eliminate any dirt particles) and allow it to sit for a few hours (24 for formula 1).

4. Once the transfer pad is ready, write your message, newsheet or drawing with ink (see formula above) onto a sheet of good quality paper (if the paper and pad are working right, you can sometimes use a ball point pen for this part).

5. Use a slightly damp sponge or rag to dampen the entire surface of the transfer pad.

6. Place the paper, ink side down, on the transfer pad. Smooth it down and leave for 4 to 6 minutes.

7. Carefully remove the paper master and the ink will have transferred to the pad. Smooth a clean sheet of paper over the image and allow 5 to 10 seconds for the transfer (allow more time for transfer as additional copies are made.

8. When finished, wipe the surface with a damp cloth/sponge and cover with paper. The remaining ink will transfer or be absorbed by the gelatin and the pad can be reused the next day.

Note: The gelatin compound can be recooked and recast to destroy old images or blemishes on the pad.

Mimeograph Board

Materials: plywood or side of wooden box; cotton cloth; strong tape or thumb tacks; mimeograph ink and stencils; paper; a smooth bottle or rolling pin.

Procedure:

1. Cut plank board, side of box or section of crate to the size of a large stencil (14 x 18 inches).

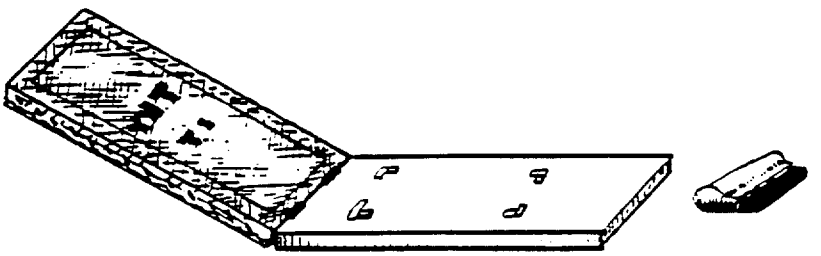
2. Fasten 3 or 4 layers of cotton cloth to the face of the board. Make sure the cloth is smooth and tightly fastened.

3. Ink the board with mimeograph ink.

4. Place stencil (prepared, words and images cut with ball point pen or typewriter) upside down on board.

5. Cover with plain paper and roll once with bottle or rolling pin.

6. Lift paper and repeat step 5 for as many copies as required (re-ink as necessary).



Silk Screen Press

Materials: A wooden frame (slightly larger than the area to be printed) hinged to a flat or framed rigid surface; Fine mesh material (silk, nylon); Stencil (purchased or hand-cut); Tape (masking or paper); Squeegee (block of wood with rubber attached to edge); Paint or thick ink.

Procedure:

1. Make a wooden frame slightly larger than a duplicating stencil or printing area.

2. Cut a board slightly larger than the frame and attach the frame to this base with hinges.

3. Cover the frame with silk or a nylon cloth tightly stretched and attach it securely.

4. Lay duplicating paper on the base and attach stencil to nylon on frame. Use tape to mask edges

5. Spread ink or paint on screen with a squeegee - made from a narrow block of wood slightly shorter than the width of the frame, with plastic or rubber attached to the edge. Lay screen frame on duplicating paper and run squeegee back and forth several times.

6. Lift frame and remove paper.

7. Repeat as often as desired.

Suggestions: Other methods of silkscreen printing include tusche and glue and photographic methods. These methods produce different and often clearer images and are more suitable for use with graphic images.

IN CLOSING

This chapter has provided you with techniques that should help you to facilitate learning in an NFE program. If you can mix these suggestions with some imagination, you will be able to create an environment that will be inviting, engaging, entertaining and ultimately educational.

SESSION 13. TRAINING EVALUATION

LEARNING OBJECTIVE:

By the end of this session, participants will increase their understanding of training program evaluation by evaluating their own training.

MATERIALS:

- Handout 1, Evaluation Terminology
- Handout 2, Evaluation Background Readings

TIME: 3 hours

ACTIVITY

Step 1: Prepare a lecturette based on Handout 1. The main points to be included in your talk are:

a. Introduction: definition, role of evaluation in model
b. Entry and Terminal Assessments
c. Goal-based evaluation
d. Process evaluation
e. Formative/Summative/Impact evaluation
f. Quantitative/Qualitative

After the lecturette explain that the following question is often used as a planning tool for evaluation:

WHO want to know WHAT for WHAT PURPOSE? and HOW?

Explain that by using this question as a planning tool, we create a grid or chart that has the following elements: write the basic question across the top of the grid (as shown below).

	Who?	Wants to know what?	For what purpose?	How?

Then, start the discussion of "**Who?**" by asking who might want to know the results of an evaluation of a program or activity (funders, trainers, learners, government). Explain that these are all called **stakeholders** for each of them having a stake or an investment in the activity.

Then, for each stakeholder, ask "**wants to know what?**" and add that information to the grid. After this is completed, move on to the "**For what purpose?**" column of the grid. Once that column is complete, ask the question of "**How?**" could you find out this information?

Step 2: Divide participants into small groups and ask them to complete the grid from their perspective and about the present training program. What do they as participants want to know about their own training? Why? How? Ask group to put their responses on chart paper. Allow 30 minutes, and then have the groups reassemble.

Step 3: Ask each group to report out to the larger group.

Step 4: Based on above suggestions, trainers should facilitate an open discussion on any issues or questions the participants and trainers might have.

Step 5: In a large circle ask participants to take a few minutes to reflect on what his/her next steps will be when they return to their organizations. Share those next steps in a large group.

Step 6: **Closing Activity. (A large group story telling about the week.)**

In a large group, ask participants to reflect on three themes as a way to evaluate and discuss the training. Ask them to think of:

- the funniest thing which happened
- the most interesting thing learned
- how the week's activities have influenced their way of thinking about training.

Then, take each theme and ask for volunteer responses. After the last theme has been discussed, the trainer should summarize the last two pints on flip chart paper as a way to arrive at closure.

Session 13.
Handout 1. Magnani and Kahler.

EVALUATION TERMINOLOGY

A. Entry and Terminal Trainee Assessments: (Pre- and Post- Test)

Entry Trainee/Participant Assessment

1. Purpose: The purpose of the preliminary assessment is to find out what knowledge, skills, attitudes, etc., the trainees/participants (as individuals and as a group) have prior to the start of the program. This information is then used to make the following decisions:

    - changes or modifications in overall direction of program,
    - changes or modifications in objectives,
    - grouping of trainees, and
    - selecting, prioritizing, sequencing of topics, materials, activities.

2. When does entry assessment occur? Depends on several factors:

    - available time for program planning,
    - available resources,
    - selection of participants,
    - distance between planners, trainers, and participants, and
    - relationship between these three groups.

    Evaluation can be implemented during Step 1: Needs Assessment or during implementation. If during implementation then the assessment is the first or second activity carried out. Naturally, the degree of modifications that can be made in the program is significantly less than if the results were obtained during Step 1. If there is much lag time between administering the entry assessment during Step 1 and program implementation, then, the entry assessment should automatically be given again during implementation.

3. When selecting techniques consider the following factors:

    - the overall needs assessment approach (i.e. problem solving, competency, or topic),
    - degree of flexibility for programming,

- time,
- access to participants, and
- participants' previous experience with assessments/forms, etc.
- participants' educational level/experience.

4. Samples of Assessment Techniques:

    - rating scales,
    - written tests,
    - questionnaires - open-ended, close-ended,
    - observation (at work site, at home, etc.),
    - interviews,
    - focus group discussions,
    - checklists, and
    - demonstrations/role plays.

Terminal Trainee/Participant Assessment

1. Purpose: The purpose of the terminal assessment is to find out what knowledge, skills, and attitudes the trainee is leaving the program with. This information is then used for the following:

    - feedback to the trainee in terms of how well they have done in the program;
    - feedback to program planners for decisions regarding future training programs for the same group of trainees or similar groups of trainees;
    - feedback to the trainers regarding their role in the implementation phase and the recommendations they would make; and
    - degree of effectiveness of meeting program's objectives.

2. When is the terminal trainee assessment carried out? At the end of the training program. This does not necessarily mean the final training activity. Trainers should be able to review the pre- and post-test results with the trainees as an additional learning activity.

3. Techniques or data collection tools can be selected among those listed for entry assessment.

B. Goal-based or Objective-based

The purpose of this type of evaluation is to determine whether or not the goals and objectives of the program were achieved and to what degree. It can be done via the

entry and terminal assessment process or at the end of each learning activity. The learning objectives would guide the evaluator in terms of what to look for. Techniques can be selected from the list previously described.

C. Process Evaluation

1. Purpose: The purpose of process evaluation is to evaluate the degree of effectiveness and efficiency of program implementation in order to make future decisions regarding: time allotted for individual sessions, effective use of time, the degree to which the content and techniques were appropriate to the level of the trainees, etc.

2. When should process evaluation be carried out? Information for process evaluation should be gathered throughout the program. The frequency depends on several factors: available time, number of trainers and other resources, length of program, whether there will be future programs, the overall evaluation plan.

3. Techniques can be selected from the samples given under Entry Trainee Assessment.

D. Formative/Summative/Impact Evaluation

These terms describe when the evaluation is to be carried out.

Formative: during the program development steps and during the implementation phase. It implies that the results can help "form" or shape the program via significant changes and/or modifications.

Summative: as the end of the program; final overall program evaluation.

Impact: occurs after the program is completed. Its purpose is to determine the longer term effect of the program on the trainees (as individuals) or on groups or the community.

13 ASSESSING PROGRESS

In this chapter we take a practical approach to the matter of evaluating your training program. There's an emphasis on answering the basic questions:

- Why do an evaluation?
- Where to look for results, for changes?
- How to know whether you've succeeded?
- What to ask?
- When to do it?
- What to do with the information you gather?

The chapter contains sample questionnaires and other tools which can be used in evaluating the results of citizen group training, but we start with the first of the questions just listed.

WHY DO AN EVALUATION?

Every training activity needs some form of evaluation. Participants deserve an opportunity to reflect on what they've learned, how far they've come, and what benefits have resulted from their new learnings. The trainer will take a special interest in evaluation, because she will want to decide whether the training plan is on target or whether some of the planning decisions will need to be revised in the future.

Evaluation is a matter of comparing expected results with actual outcomes—for the individual member, the group, and the community.

During our school days, evaluation meant examinations, and the focus was on whether we learned our lessons. But exams were also a test of how well the teacher taught—whether she was able to get her message across effectively. We don't think exams or grades make sense for citizen group training, but we do think the trainer needs information upon which to base planning decisions such as these:

- Are the focus and the objectives of the training appropriate? Are they based on an accurate assessment of needs? Are the real problems being addressed? Also, do participants understand and agree with the objectives?
- Are the methods and activities suitable? Are they achieving the objectives? Are they being carried out effectively?
- Is there an effective climate for learning?
- Are informational presentations appropriate and effective?
- Are there adequate resources (content specialists, printed matter, audio-visual aids, etc.)?
- Is enough time being allotted for training? Is the pacing of training activities appropriate?
- Are skills and information being conveyed in such a way that participants can carry them back to real world situations and use them successfully?

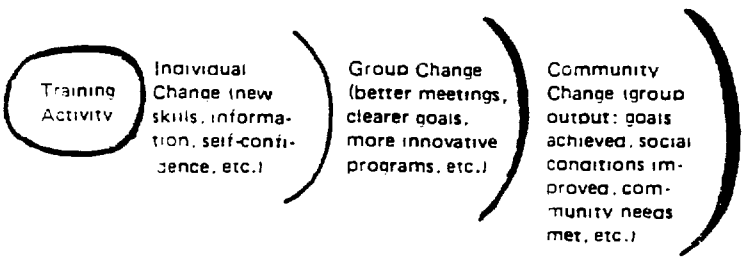
WHERE TO LOOK FOR CHANGE

Evaluation is a matter of looking for changes (we hope improvements!), comparing those changes with the results you hoped to achieve, and then deciding whether to revise your methods in the future. So, in planning an evaluation of your citizen training activities, the first question is "Where should I look for changes?"

In public school education, the changes we would look at are within the student—his ability to perform certain tasks (long division, map reading, cursive handwriting), state certain facts (boiling point of water, Spanish words for colors, plot of a novel), or explain certain events (causes of World War I, the reason why some cities have smog). In other words, evaluation would focus on the learner.

In "on-the-job training," an evaluator would look at the learner's knowledge or skills (ability to perform five basic operations with a drill press) but also at output (learner is able to produce 20% more widgets per hour). (In a public school setting, the "output"—the application of what has been learned—is often years away, and is therefore inconvenient to measure.)

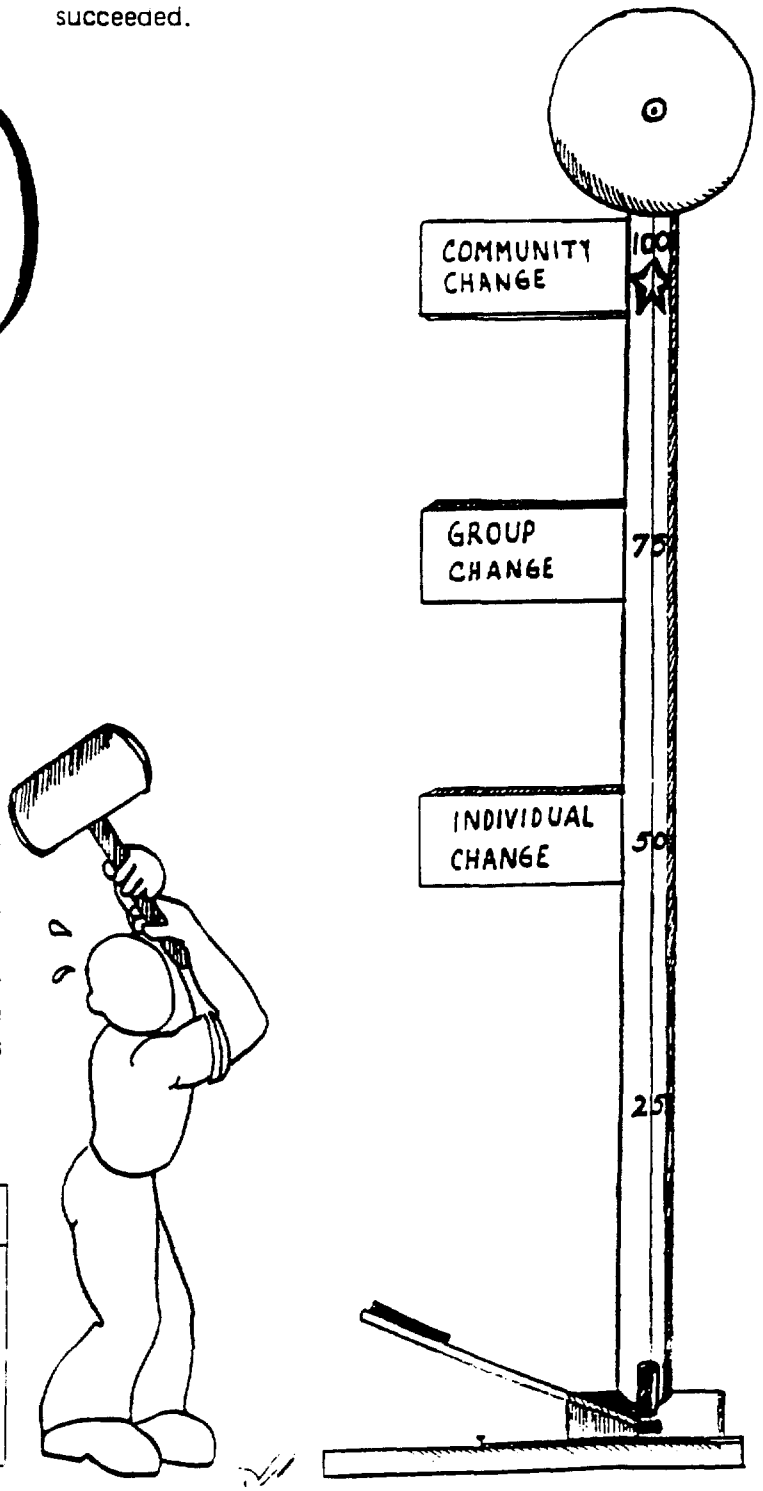
So where should we look for change as a result of citizen group training? It's possible to think of the training activity as a stone dropped in a quiet pool of water, producing at least three distinct ripples:



We would hope to create changes on all three levels as a result of a citizen group training activity. The first level, individual change, is the most direct—it will show up fastest and will perhaps be the most dramatic. After a workshop on writing press releases, members should be able to write an effective release, will understand what they need to do in order to have the best chance of getting their story into the news media, and will feel confident about their ability to succeed at these activities. Based on these **individual** changes, **group productivity** should change: more press releases would be written each year, perhaps of a higher quality than before, and there would be consistent personal follow up with editors or news directors to get the stories used by the media. **Community change** would depend on the content of the press releases, but might include: increased community awareness of the citizen group's activities and concerns, increased time and money devoted to those concerns, legislation passed or social conditions changed.

Training Activity	Individual Change	Group Change	Community Change
Workshop on writing press releases	Ability to write them; understanding of process for securing story; self-confidence	More and better releases; better follow-up	Awareness of activities and concerns; time and money allocated; legislation passed; conditions changed

If you wrote learning objectives as suggested in Chapter 7, the individual changes you're after will probably be the learning objectives. (If you don't have any learning objectives in mind, now is the time to pin them down.) But unless you're content to have individual group members learn something new (anything!), you'll want to identify the group changes and community changes that you hope will result from training. The following exercise provides an opportunity to do that; the third step in the process anticipates our next topic: how to know whether you've succeeded.



Exercise: IDENTIFYING EXPECTED RESULTS

Number of people: one to many
minimum time: 20 minutes
materials: copy of the form below

Process:

1. Identify a training activity (ideally, one which you plan to carry out); write its name in the appropriate box on the form. It's best to name a very specific activity rather than a broad topic.

2. Identify and list the results (changes, impacts) which you expect to occur because of the training activity. Use the three categories—individual change, group change, and community change—plus "other" if needed.

3. For each change expected, identify targets or criteria that will let you know that you've achieved the expected results. Example (based on press release workshop, above):

Group change—20 different press releases per year (compared to present rate of four per year)
—releases delivered to 100% of the appropriate media outlets
—at least 75% of the releases sent produce coverage
Community change—20% of the community knows about our group and its concerns
—25 new volunteers are willing to contribute time to our cause
—local officials sense public concern and give more support.

4. Don't be concerned at this point about the fact that some of these targets will be difficult to measure.

5. If you have other training activities in mind, use a separate copy of the form for each of them, repeating steps one to three above.

Training Activity	Individual Changes	Group Changes	Community Changes
	•	•	•
	•	•	•
	•	•	•
	Targets:	Targets:	Targets:
	•	•	•
	•	•	•
	•	•	•

Discussion Questions:

- *Are the changes plausible, considering the nature of the training activity being planned?*
- *Are the targets specific enough so that there will be no question about whether they have been reached?*
- *Is there such a thing as partial success—when something less than the target has been achieved?*
- *How soon after training do you expect the desired results to appear?*

One last point about where to look for changes: there are usually some results which you never foresaw. People may learn things from an activity which you didn't plan for; coffee-break conversations may lead spontaneously to important decisions about how the group should proceed. These serendipitous results may be good or bad; they are likely to be important, and should be included in any examination of results.

INDICATORS OF SUCCESS

You'll never know whether you're getting where you want to go unless you have specific targets or indicators. Exactly what they are depends on the sorts of change you expect.

Individual change—the targets will be behavioral objectives or performance criteria, as described in Chapter 7. When it comes time to carry out the evaluation, these targets can be incorporated into an examination, or participants can be asked for a subjective self-assessment—whether they think they can perform according to the criterion.

Group change—targets may involve increased quantity or quality of output (example: press releases, as above). However, the group change may involve shifts in the way a group spends its time: it may involve adoption of new or innovative practices, ranging from brainstorming to rotating leadership of meetings to use of the local cable television station, to lobbying at the state house. If innovative practices are introduced or recommended in the training session, then it's natural to ask whether they get used later in the life of the group. And if they get used once, will they get used again?

Community change—number of people reached and influenced is one obvious indicator, although it may not be easy to measure. It's even more difficult to assess how much people's opinions have changed, but that may be a target nonetheless. Ultimately, the question here is whether training has helped the group to become more effective at whatever it's trying to do—improve the quality of the environment, increase the number of low-cost housing units available, assure that there's quality health care for all, etc. If the group has targets for measuring its progress, then it can be hoped that training will speed the achievement of those targets.

There's another indicator of success which shouldn't be underrated—participant satisfaction. People generally know what they want from a training experience, at least in an intuitive way. If they're satisfied, self-confident and energized as the result of a training session, that's a pretty strong indicator that you're doing something right.

Participants can be asked for specific opinions—about particular parts of the training activity, about the trainer, about the materials used, about the activities selected. They can become partners with the trainer in assessing progress and making revisions in the training plan: they can be asked for suggestions about which parts of the training plan to modify and how.

Michael Chan

WHAT TO ASK

The essence of an evaluation is some means for gathering information—probably a list of questions. This section contains some specific examples and suggestions. You may want to use one of the samples or develop your own questions.

Reaction Form. The CITP often uses the Reaction Form on the next page; workshop participants are asked to complete it near the end of the session. At that time, it's too early to measure the group changes and community changes which may result. Therefore, the emphasis is on the participant's opinions, self-assessment, and suggesstions. Here is the thinking behind the specific questions (numbers correspond to the items on the reaction form):

Reaction Form

To help us improve future training sessions, please complete the following questions and return this form to the facilitator before you leave. Thanks!

Title of Training Session: _____ Date: _____

1. Right now I feel

   ____ excited ____ confident ____ confused ____ tired

   ____ bored ____ angry other: _____

2. Describe your own effort or involvement: ____very great ____great ____medium ____little ____very little

3. What did you expect to learn at this workshop?

4. What is/are the most significant thing(s) you learned today?

5a. In what ways did this workshop meet or go beyond your expectations?

b. In what ways did this workshop fall short of your expectations?

6. What changes do you feel might improve this workshop?

7. How did you hear about this workshop?

   ____ flyer ____newspaper ____radio ____word of mouth

   other: _____

8. Based on your own expectations, what overall rating would you give this workshop? (1 = low; 10 = high)

   1 2 3 4 5 6 7 8 9 10

COMMENTS

1. **Participant feelings** as a gauge of the overall success of the training activity

2. **Level of involvement** in order to determine the average involvement level which the activity stimulated, and as a test of the old adage, "You only get out what you put in."

3-4. **Expectations and actual learnings**—Item 4 identifies things which were learned and which the learner considered significant. A comparison with item 3 indicates initial expectations which were and weren't fulfilled, thus indicating areas which need more attention in future workshops.

5-6. **Successes, shortfalls, and suggested changes**—Here the learner becomes a coevaluator and coplanner of future workshops.

7. **Publicity**—This item may be of interest if several channels have been tried.

8. **Numerical rating**—Less informative than the other items, but it does allow for comparison with other workshops.

Self-Assessment. Another approach to evaluation is to focus on the specific learning objectives of the session. An exam or quiz does that, but may stir up a lot of defensiveness and competitiveness within the citizen group; basically, we don't see this sort of testing as part of an egalitarian, "colearners" approach to training. Instead, we recommend self-assessment. Here is a sample format for such questions:

> Several of the main skills covered in this workshop are listed below. To the right of each item, circle a number from 1 to 4 to indicate your estimate of your current ability in each area.
>
> 4 = more than adequate
>
> 3 = adequate
>
> 2 = less than adequate
>
> 1 = much less than adequate
>
> Your answers will be used to plan future training activities. They are a test of the workshop, not of you!
>
> A. Ability to write a press release 4 3 2 1
>
> B. Ability to identify media outlets (radio, TV and newspapers) which should receive press releases 4 3 2 1
>
> C. Ability to respond confidently to a newsperson's call for additional information 4 3 2 1
>
> D. Etc.

STOP PROCESS

In the middle of a training session, it may be desirable to find out how people are reacting. A "Stop-Process Evaluation" can accomplish just that. At any point in the session, the trainer asks everyone to stop what they're doing and to jot down brief answers to a few questions, which could be posted on newsprint. For example:

> STOP-PROCESS EVALUATION
>
> 1) My energy level right now is _____ (one word).
>
> 2) The best thing that happened so far is _____
>
> 3) The thing I want to happen which hasn't yet is _____

Participants would answer on half-sheets of paper. The trainer or a helper would scan the answers and decide whether to modify the plan for the remainder of the session.

In a small group, short answers could be given verbally so that everyone would know how others are reacting. Obviously, many different questions could be asked, depending on the nature of the training activity, and participants could share directly in the decision whether to modify the plan.

FOLLOW-UP QUESTIONNAIRE

Whatever the timing or style of the evaluation, there are various types of questions which could be added. To tap the "group change" and "community change" aspects, one could develop a follow-up questionnaire (say, a month after) which might ask:

> Since our workshop on using the media (May 22), have you noticed any changes in the way our group performs in the areas covered by the workshop?
> ( ) yes ( ) no
> If yes, please specify:

OR . . .

Our workshop on using the media (May 22) included a number of specific skills and suggested procedures. Some of them are listed here. Indicate how well you think we're doing as a group in using each skill or procedure, by circling a number from one to four:

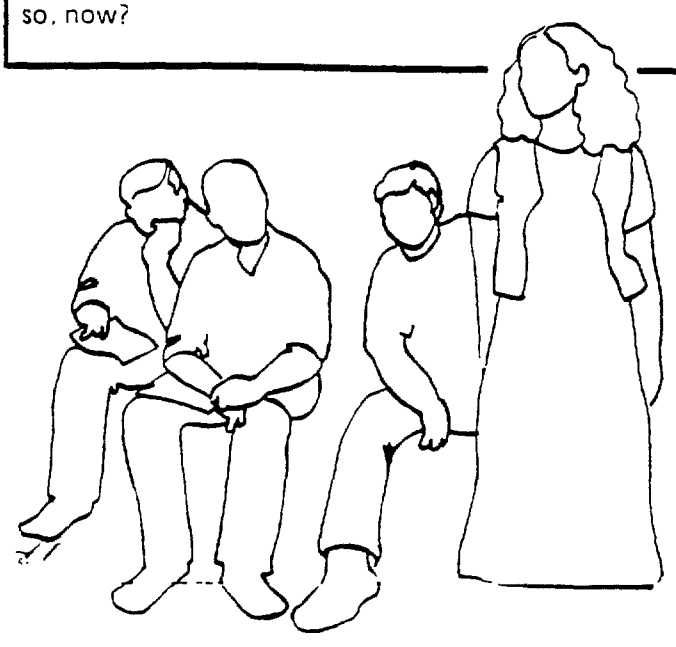
4 = use the skill or procedure as often as is appropriate
3 = use the skill or procedure some, but less than we could
2 = use the skill or procedure much less often than we could
1 = don't use it at all

- Method for writing a good press release 4 3 2 1
- Procedure for developing a log of mass media outlets in our area 4 3 2 1
- Brainstorm of strategies for communicating our concerns to the public 4 3 2 1
- etc.

AND . . .

Since the May 22 workshop, have you noticed any changes in the way our organization relates to the community? ( ) yes ( ) no . . . changes in our progress toward our goals in the community? ( ) yes ( ) no If yes (for either part) please specify:

Did these changes result from the learning which occurred at the workshop? ( ) yes ( ) no If so, how?



Selecting Questions. Many different types of question are possible. The best strategy is to examine the objectives and the expected outcomes of your training activity. Try to write a number of different versions—more questions than you could possibly use—and select the questions which seem most helpful and have the best chance of helping you decide what changes to make in your training plan.

One additional approach to evaluation uses questions found earlier in this manual. It involves going back to needs analysis (chapter six), since an updated needs analysis will tell you part of what you want to know: what topics now need attention (or more attention). The drawback of this approach is that it may not give sufficient detail about the skills or information which the workshop addressed; the strength is that it may tell you that participants know all they want to know about the skill-area in question, and are ready to move on to something else.

A final approach to evaluation might go by the name "unobtrusive measures." Often, answers to questionnaires or interviews are slanted according to what the respondent thinks is expected, so social scientists often try to verify their findings with measures which aren't subject to this sort of bias. Unobtrusive measures are, by definition, those which do not require an interview or even the conspicuous presence of an observer. They could be used during a workshop or during activities of the group later on. Examples: attendance at meetings after the workshop (compared with before), noise level within discussion groups, rate of volunteering for special responsibilities, etc.

WHEN TO ASK

There are several possible times to evaluate: before training starts (as a basis for comparison), at the middle of a workshop session, at the end of the session, at the end of a series, several weeks or months later when group and community change can be assessed. Each has its purposes.

Educators are prone to group evaluations into two types: **formative evaluations**, which occur during a training activity or series (to help form the remainder of the training), and **summative evaluations**, which occur at the end of the training to sum up the outcomes. Formative studies are directed toward possible changes in the training plan, whereas summative evaluations are prone to emphasize the results of training. However, the end of one training series may be the beginning of another, so a summative evaluation of one series may help form the next.

When you conduct an evaluation depends on how eager you are for formative information and how long you think it will take for results to surface (or fade away!). You may need to take a before-and-after approach in order to be able to have a base-line against which to measure changes. The following exercise, reprinted from CITP's manual, **Planning, for a Change**, reviews the issue of timing as well as information-gathering method and the general type of information you're after. It would be useful when you're first planning an evaluation, and before you invest a lot of time in developing specific questions.

What Would an Evaluation of "The Event" Look Like?

no. people: one to several
minimum time: 8 minutes
materials: form below

Suppose the planners wanted to find out how successful an activity was/is. Listed below are several different ways of designing an evaluation. How the evaluation is conducted usually depends on the decisions, information needed, the size and scope of the project and the energy and resources needed to conduct the evaluation.

1. Working individually, select one or more items from each column. Check these items you've selected (2 minutes).

2. Each person then shares his preferences in small groups, stating *why* the items were chosen (6 minutes).

What kind of information/ data do you need to collect?	How would you do the evaluation?	When would you do the evaluation?
☐ *Behaviors*	☐ *Interviews*	☐ *Before and after*
☐ *Feelings*	☐ *Comparison group (people who didn't attend the event)*	☐ *Three weeks after*
☐ *Participation in activities*	☐ *Questionnaire*	☐ *In the middle*
☐ *Attendance*	☐ *Observation*	☐ *At the end*
	☐ *Documents (videotape, newspaper articles)*	☐ *Other*
	☐ *Physical evidence*	
☐ *Noise level*	☐ *Personal diaries of those who attended*	
☐ *Other*	☐ *Tests (attitudinal, values, etc.)*	
	☐ *Ratings by planners, those who attend, and "professional party goers"*	
	☐ *Other*	

WHAT TO DO WITH THE INFORMATION YOU GATHER

An evaluation does no good if you sit on the findings. First of all, it's necessary to summarize the results—average the numerical scores, list and group the significant learning, list the suggested changes, sketch a flow chart of impacts—whatever it takes to understand and remember what the information says.

Decide what changes are needed in your training plan.

Second, decide whether changes are needed in your training plan, and what they might be. Third, decide who else should know the results. Perhaps some doubting group members or a sponsoring agency need to be impressed with successes; perhaps the participants need to know that they shared a perception about weak points, or what needed to happen next. And who should participate in designing any modifications to the learning plan? When are you going to make those decisions? If time hasn't been scheduled for a future training session, when will it be?

In short, if there are changes to be made, go to it! If your training session was a success, go celebrate!

EVALUATION:

Finding out how effective your program is

Evaluation is the process of finding out how well things are being done. It tries to answer the questions:

Evaluation of training programs has been approached in many ways, and for many purposes. Some approaches help to increase the understanding, sense of equality, and shared respect of all concerned. Other approaches tend to reduce groups of persons to being the 'objects' of studies largely outside their control—studies through which they are judged, but may not openly judge in return.

EVALUATION—FOR WHOM AND BY WHOM?

Evaluations run by outsiders: Sometimes an evaluation of a training program is requested by a funding agency or by program administrators in a distant city. The design for such an evaluation usually comes from the outside. Or an 'expert' is sent in to conduct it. Too often, both the process and results serve the needs of those requesting the evaluation more than the needs of those actually involved in the program. This kind of top-down evaluation is not our concern in this book.

> **Note:** Sometimes help with evaluations from persons outside the program is beneficial—as long as they understand the local situation, assist only where asked, and do not take charge.

Evaluations run by participants: Some community-based programs are recognizing the importance of having **all** those involved with the program take part in a continual evaluation process. In this way, evaluation becomes a cooperative effort of self-criticism and reflection. It not only considers the results of community-based education and action, it is a part of the process.

The rest of this chapter is about this second kind of evaluation.

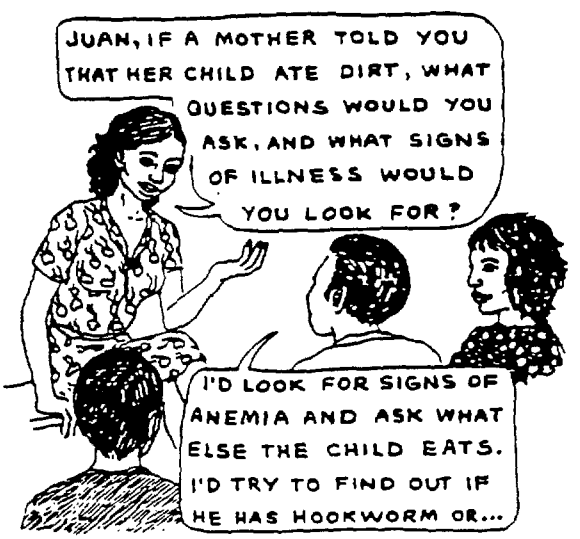
WAYS TO INCLUDE STUDENTS IN EVALUATION DURING TRAINING

(based on evaluation and self-testing methods used in Project Piaxtla, Mexico and in the Women's Health Promoter program in Olancho, Honduras)

1. **Short evaluation discussions at the end of each class.** These can happen in both of the following ways:

Instructor asks students to comment on how they liked the class, what they learned, and how it might have been better.

At first it may be hard for students to speak up and criticize the instructor. But if the instructor makes it very clear that she welcomes friendly criticism, students can become good evaluators by the end of the course.



Students test themselves by asking each other about what they have learned. They try to ask questions that relate their learning to real situations, questions that make each other think.

The main purpose of this kind of questioning is to see how well everyone can understand and apply what was covered in class. In this way the students help the instructor learn how effective her teaching was. She finds out where she needs to make things clearer, or to teach the material differently.

At first students may find it difficult to think of good questions, but with helpful suggestions, many will become quite skillful at this by the end of the course.

2. **A rotating evaluation committee.** Students can take turns forming an evaluation committee to help make known the ideas and reactions of both students and instructors. A new committee can be formed every week or two, so that everyone gets some experience in evaluating.

The responsibilities of the committee can be decided by the group. They might include:

- Observe classes and comment on their strengths, weaknesses, and ways they might be improved. (See list of questions, page 9-17.)
- Consider how well course content prepares students for their future work.
- Observe attitudes and actions, both helpful and harmful, of the students and teachers; recommend possible ways to improve.
- Plan and lead weekly all-group evaluation sessions.

3. **Weekly evaluation sessions.** These are attended by all students and staff, and, if possible, by members of the local community or health committee. The sessions can be coordinated by the student evaluation committee. This gives students a chance to learn organizing and leadership skills.

The sessions can cover evaluation of classes and activities, plus any concerns, complaints, problems, and outstanding events that come to mind.

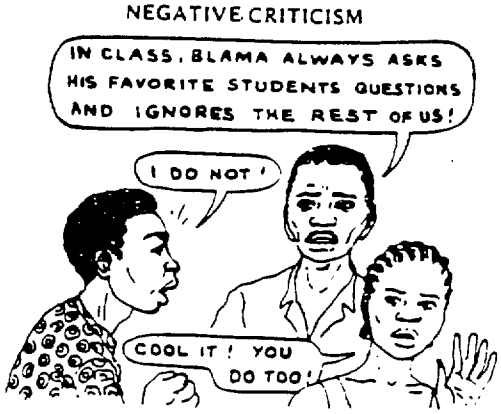
DEVELOPING THE SKILL OF CONSTRUCTIVE CRITICISM:

In the evaluation sessions just described, both students and instructors will quickly discover how difficult it is for most people to accept criticism. But with a few suggestions, everyone can begin to learn ways of criticizing that are less likely to offend.

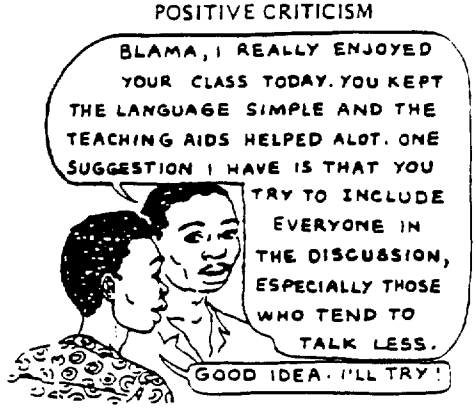
When offering criticism, be sure to comment on the good as well as the bad. And mention the good things first.

Try to praise 3 things a person does well each time you point out 1 thing he does wrong.

NEGATIVE CRITICISM



POSITIVE CRITICISM



What 4 important differences can you find in these 2 examples?

INSTRUCTORS' SELF-EVALUATION AND GROUP EVALUATION

In addition to evaluation sessions with students, it is wise for instructors to do their own evaluation of classes and activities. Here are some possibilities:

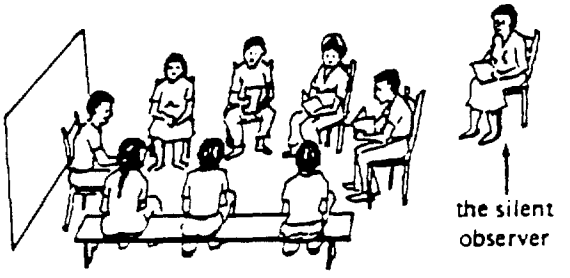
Self-evaluation of classes. This is easier if you make a fairly complete class plan in advance, listing points to emphasize and the teaching methods you intend to use (see p. 5-3). When the class is over, you can then see how well you covered each of these.

It helps to make a **checklist** (like the one on the next page) to be sure your evaluation covers each important aspect of teaching, such as:

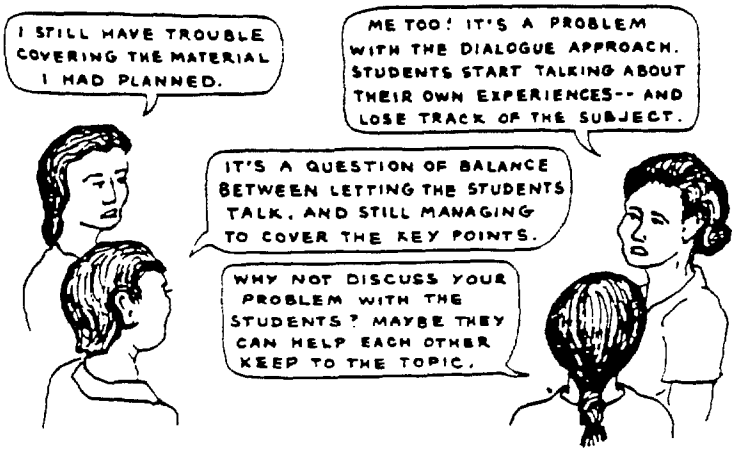
- coverage of what was planned
- participation by all students
- use of teaching aids and appropriate methods
- relating material covered to students' experiences
- fairness and friendliness
- communicating clearly and simply
- review of important points
- final evaluation to find out what students learned and how they feel about the class

To make the evaluations more useful for you or anyone who may teach a similar class, **write down your suggestions for improving the class.** File them with the class plan. This takes extra time, but it helps the class to become better each time it is taught.

The silent observer. A 'training adviser' or another instructor sits at the back of the class, observes, and takes notes. If possible, the observer should have a copy of the class plan to see how much of the planned material is covered. She also may want to use a checklist such as the one on the next page. After the class, she and the instructor discuss the strengths and weaknesses of the class, and how it might be improved.



Daily evaluation sessions to discuss classes. These are especially helpful when the teaching team is not very experienced. Instead of discussing each class privately, the silent observers and instructors all meet for half an hour or so each day to discuss the classes. This way everyone benefits from the suggestions and criticisms.



OTHER ORIGINAL IDEAS FOR EVALUATION

The first two ideas come from the Community-Based Health Program newsletter, *Tambalan,* from the Philippines (November, 1979).

USING DRAWINGS

"In Bukidnon, instructors once grappled with the task of evaluating their first training session with a group of farmers who had reached only the lower grades in elementary school.

"Solution: they had the farmers put into drawings what they had learned during the session. The drawings weren't any more sophisticated than what most non-artists would produce, but in terms of content, the drawings conveyed a lot more than would have been expected from a written report."

USING DRAMATICS (ROLE PLAYING)

"Instructors had used two different training processes in two *barrios.* Curious about the consequences of their use of different approaches, the staff asked the *barrios* to present skits centering on how they looked at their situation.

"The differences in training methods, the instructors found out, were very strongly reflected in the plays presented by the *barrios.* In the *barrio* where health skills were emphasized, the people's perception of their situation was passive, almost fatalistic.

"But in the other *barrio,* where organization skills were emphasized, the people depicted their situation the same way as the neighboring *barrio* did, with one important difference. Instead of showing passive acceptance, they portrayed themselves as people aware of their own potential to change their situation.

"That experience set the instructors to thinking about the program as a whole and impressed them with the need to change their own orientation and methods."

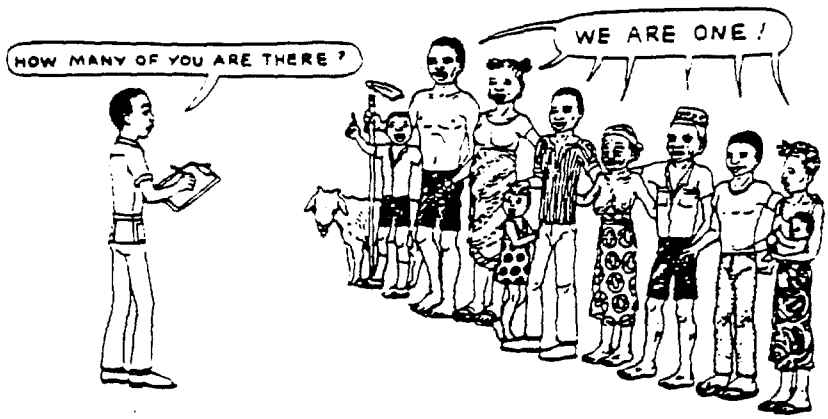
USING VISITORS

In Ajoya, Mexico, the village health team asks all visitors to write down their observations and opinions of the program. The team uses these outside viewpoints to help evaluate and improve their program.

THE LIMITATIONS OF EVALUATION

The long-range impact of a training course can never be fully measured or known. The human factors in a health worker's training and work may, in the long run, be what influence the people's well-being most. But these human factors may only affect health statistics years later. The seeds the health worker plants deepest may not produce fruit until after he or she is dead and gone. Humanity moves forward slowly!

It is not the number of latrines built or babies weighed that determines a health worker's effectiveness. Rather it is the people's growing awareness of their ability to meet their needs for themselves. In the long run, health is determined more by human qualities than by physical quantities. Evaluation that focuses largely on numbers often tends to forget this.



When conducting an evaluation, remember that
UNITY CAN BE MORE IMPORTANT THAN NUMBERS.

EVALUATING EVALUATION

We need to ask of the evaluation process the same searching questions that we continually ask about each aspect of our training or health program:

- Does it strengthen the voice of the powerless? Does it help lead to greater decision making, control, and self-reliance on the part of those who have less? (whether students, villagers, workers, etc.)
- Does it encourage trust, responsibility, and greater equality among all concerned? (teachers, students, health workers, mothers, advisers, etc.)
- Does it help equip people with the knowledge, skills, attitudes, and examples they need to understand and work together to solve their biggest needs?
- Does it consider the group's long-term goals, or vision, as well as short-term objectives?

Evaluation should not only measure whether we have achieved our goals. It should help us judge whether our goals were appropriate in the first place.