How Adults Learn

Core Adult Learning Principles
Learners Need to Know Why, What, How
Self Concept of the Learner Autonomous, Self-directing
Prior Experience of the Learner Life related, Developmental task
Orientation to Learning Problem centred, Contextual
Motivation to Learn Intrinsic value, Personal payoff

Some characteristics of adult learners

- Adults need to know why they are learning something
- Adults are motivated when learning contributes to their quality of life, and self esteem
- Adults have greater knowledge and wider experience than younger learners.
- Adults like to be able to evaluate, challenge and question.
- Adults need to integrate new ideas with "old" ones if they are going to keep and use the new information.
- Adults can find it more difficult to relate to, remember and recall if what they are learning is totally new.
- Adults consider themselves independent.
- Adults are concerned with immediate problems.
- Adults enter learning situations with their own goals, motivations and needs.
- Adults learn better by doing something rather than just reading or discussing.
- Adults like clear “hands-on” instructions.
- Adults prefer training programmes that deal with a single topic and focus on applying it to problems.

Adults learn better when…

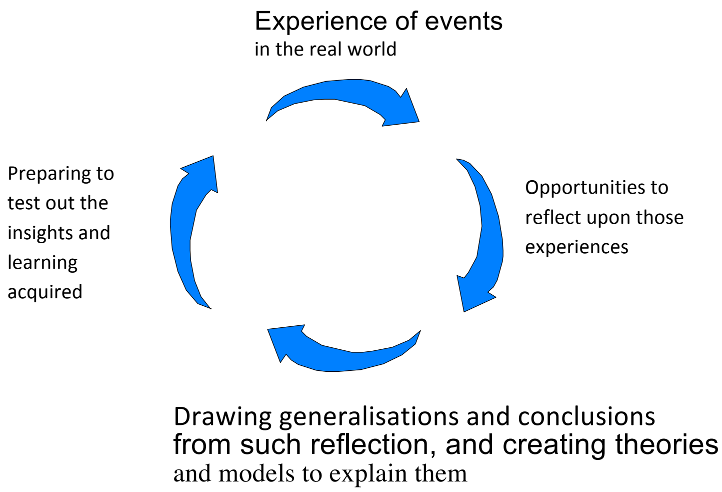
- they are involved
- the goals and objectives are realistic and important to them
- materials are structured to meet their needs
- the subject matter is connected to their daily activities
- learning is experience-based and results from doing and exploring something
- learning is in informal but organised environments
- materials are presented through a variety of methods with practical examples
- subjects are explained and supported visually
- activities and tasks are structured and clearly related to specific subjects
- problem-solving
- real, simulated or case study experiences are used
- there are opportunities to apply and practise what they have learnt
- structured, helpful feedback is given
- learning situations are co-operative and in groups .
- not pressured, tested or judged.
- there is time for reflection and short breaks between topics.

Learning from experience – Kolb's learning cycle

As adults, we tend to learn from experience. And how we perceive and learn new things is influenced by previous experiences, education, background and culture. We like to have some control over what we learn and to be able to apply it to real situation.

David Kolb's famous model of experiential learning (1975) is shown below.

The Cycle of Experiential Learning



By experience we mean to learning from our own personal involvement with the structured event or incident as opposed to being told by the trainer what should be learned from it

The cycle of learning above involves four discrete sequential steps:

- **Concrete Experience**: All learning commences with some experience of an event, incident, or occurrence. This may be naturally occurring, as with most life experiences, or artificially induced, as for instance, when the trainer introduces a role play into a course.
- **Observation and Reflection:** Awareness-raising and personal learning start to occur when people have opportunities to reflect and think about the experiences they have gained. This can be assisted if the facilitator provides helpful structures for reflection.
- **Abstract conceptualisation:** Reflection leads to a sorting and understanding of earlier experiences from which the person can draw conclusions and generalisations. These help to order the experiences and provide a framework in which to learn about them.
- **Active Experimentation:** Using this framework, new experiences can be planned which test out the conclusion, either to confirm the learning already achieved or to generate more evidence. Such testing out leads to more experiences in the real world which in turn set the cycle in motion again.

Learning styles

Honey and Mumford (1992) described four main types of individuals, and their preferred ways of learning.

The four learning styles are listed below and described in turn.

- Activists
- Reflectors
- Theorists
- Pragmatists

Activists

Activists like to be involved in new experiences. They are open minded and enthusiastic about new ideas but get bored with implementation. They enjoy doing things and tend to act first and consider the implications afterwards. Activists like working with others but tend to hog the limelight.

Activists learn best when	**Activists learn less when**
▪ involved in new experiences, problems and opportunities ▪ working with others in games, team tasks and role-playing ▪ being thrown in the deep end with a difficult task ▪ chairing meetings and leading discussions	▪ listening to lectures or long explanations ▪ reading, writing or thinking on their own ▪ absorbing and understanding data ▪ following precise instruction to the letter

Reflectors

Reflectors like to stand back and look at a situation from different perspectives. They like to collect information and think about it carefully before coming to any conclusions. Reflectors enjoy observing others and will listen to their views before offering their own.

Reflectors learn best when	**Reflectors learn less when**
▪ observing individuals or groups doing something ▪ they have the opportunity to review what has happened and thing about what they have learned ▪ producing analyses and reports doing tasks without tight deadlines	▪ acting as leader or role-playing in front of others ▪ doing things with no time to prepare ▪ being thrown in at the deep end ▪ being rushed or worried by deadlines

Theorists

Theorists adapt and integrate observations into complex and logically sound theories. They think problems through in a step-by-step way. They tend to be perfectionists who like to fit things into a rational scheme. Theorists tend to be detached and analytical rather than subjective or emotive in their thinking.

Theorists learn best when	**Theorists learn less when**
▪ they are put in complex situations where they have to use their skills and knowledge ▪ they are in structured situations with clear purpose ▪ they are offered interesting ideas or concepts even though they are not immediately relevant ▪ they have the chance to question and probe ideas behind things	▪ they have to participate in situations which emphasise emotion and feelings ▪ the activity is unstructured or briefing is poor ▪ they have to do things without knowing the principles or concepts involved ▪ they feel they are out of tune with the other participants, e.g. with people of very different learning styles

Pragmatists

Pragmatists are keen to try things out. They want concepts that can be applied to their job. They tend to be impatient with lengthy discussions and are practical and down to earth.

Pragmatists learn best when	**Pragmatists learn less when**
▪ there is an obvious link between the training topic and their work ▪ they have the chance to try out techniques with feedback, e.g. role-playing ▪ they are shown techniques with obvious advantages, e.g. saving time or money ▪ they have a role-model or credible expert	▪ there is no obvious or immediate benefit that they can recognise ▪ there is no practice or guidelines on how to do it ▪ there is no apparent pay back to the learning, e.g. no time or money saved ▪ the event or learning is 'all theory'

Most of us have elements of more than one learning style. Knowing which are your strongest and weakest styles will help you identify how you best learn.

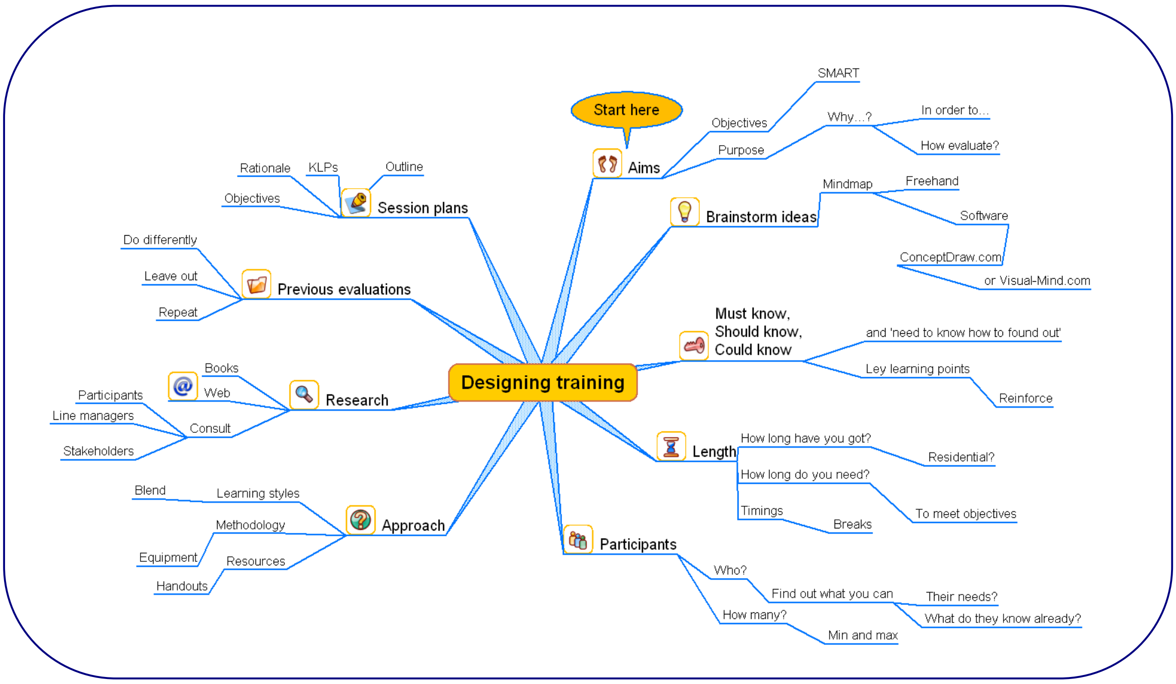
As a trainer, having an appreciation of the different styles will help you to design stimulating and effective training sessions.

Your learning style can affect your training style

As a trainer, be aware of how your own learning style may affect your choice of activity. Aim to appeal to all learning styles and pick a range of methods, not just those that you might naturally favour.

If you are an ACTIVIST you may be more likely to favour:	If you are an THEORIST you may be more likely to favour:
▪ A wide range of different activities ▪ Brainstorming ▪ Experiential activities ▪ Games and role-playing ▪ Group tasks ▪ Icebreakers and energisers ▪ Problem-solving activities ▪ Unstructured "play-it-by-ear" activities	▪ Analysis of information ▪ Handouts with detailed background information ▪ Presentation of theories, models, concepts, systems ▪ Question and answer sessions ▪ Relating the training activity to the relevant theory/model ▪ Structured situations
If you are an REFLECTOR you may be more likely to favour:	**If you are an PRAGMATIST you may be more likely to favour:**
▪ Activities building on pre-course work ▪ Exchange of information ▪ Observing or using observers ▪ Presenting research and analysis ▪ Reviewing group activities to learn lessons ▪ Showing videos and DVDs ▪ Structured group discussions ▪ Using video to record activities or role-plays	▪ Activities that have quantifiable end-result ▪ Anything with an immediate, practical application ▪ Case studies closely linked to people's experience ▪ Demonstrations ▪ Practical exercises that give participants the opportunity to try things out ▪ Simulations of "real" situations

Designing training



When designing training, start with your aim and objectives. Keep referring back to these to make sure that the training you are designing will achieve these.

Next, brainstorm ideas. Put down everything you could include in the training and the different ways in which you could go about it. Be guided by your objectives but allow for creativity; you can rule things out later. You could use a *mindmap* like the one above.

When you have a list of potential topics, work out from these what it is the trainees *must* know, *should* know and *could* know. There may also be things that they don't need to know, but need to know where to go to find it out. Sorting out potential topics and information in this way will help you decide what to cover and what you can afford to leave out. Remember that people remember only so much from a training session, so focus on the *must knows* and *should knows*. You can include *could knows* if there is time – they provide the 'frills' and can make the training more enjoyable but recognise they may not be remembered after the training. Your *must knows* become your key learning points and should be reinforced throughout the training.

On a separate sheet of paper, identify the *must knows*, *should knows* and *could knows* for your training session. Use this information to help write your key learning points.

Must know	Should know	Could know

From a need to an aim to an objective

It starts with a need

A training need is the gap between the current level of knowledge and skills, and the desired state – i.e. what someone needs to know or be able to do.

Identifying and assessing training needs involves:

- Clarifying the desired change
- Identifying the trainees or potential trainees
- Assessing their current knowledge, skill or attitudes
- Starting to determine the best training approach (if, indeed, the solution is training)

Clarify the purpose

Part of assessing the need is clarifying the purpose. Why training? Clarifying the purpose will help you set aims and objectives for the training.

To get a purpose, ask WHY?

Note that when asking the question 'why', you will sometimes arrive at reasons. For example, asked why people need training in stress management, you may be told that it is because people work in a highly stressful environment– this is a good reason but it doesn't in itself tell us why there should be training. A good purpose starts with words like 'to', 'in order to' or 'so that'.

The purpose, in this example, may be 'to help people remain effective in highly stressful situations'.

State the aim

Having clarified why you are doing the training, state what you want the training to achieve. This will be a broad statement of intent and is the first stage to setting the objectives. In the example above, the aim is likely to be something like 'to help people take steps to minimise stress, and to recognise and deal with stress when it occurs'.

In may cases, the purpose and aim will be very similar.

Now that you have an aim, you can set some objectives.

Writing training objectives

Training objectives are specific statements of what a participant should be able to demonstrate in terms of skills, knowledge or attitude at the end of a training session or course. Having training objectives helps us to plan; we know what we must include in the training session and what we can afford to leave out.

Objectives serve the following purposes:

- They relate the content of the training to the knowledge, skills and attitudes identified in task analysis, which is based on the desired job performance of an individual.
- They make planning and implementation of training focused, effective and efficient.
- They are standards by which training can be evaluated.

SMART objectives

So that the training objective is clear about what we want to achieve and gives us something to evaluate against, make sure it is SMART.

SMART objectives are:

Specific – what, specifically, do we want the trainee to be able to do

Measurable – we will be able to judge whether we have succeeded

Achievable – it is possible given the time and resources available

Relevant – it fits with the aim of the training and relates to other objectives

Timebound – it is within a given timeframe, e.g 'By the end of the session…'

When writing a SMART objective, be careful about the words you use. Some words and phrases are vague, difficult to measure or open to interpretation.

Avoid using these words or phrases, which are vague and hard to measure	
Appreciate	Have a grasp of
Be aware of	Have a working knowledge of
Be familiar with	Have faith in
Be interested in	Improve
Believe	Know / Really know
Enjoy	Realise
Have a feeling for	Understand
Prefer these words, which are specific and easier to measure	
Compare	Identify
Conduct	List
Construct	Participate
Demonstrate	Select
Describe	Solve
Design	Specify
Differentiate	State
Explain	Write

Examples of SMART (and not very SMART) objectives

- × By the end of the session, participants will understand what a SMART objective is.
- × By the end of the session, participants will appreciate how to write SMART objectives.
- ✓ By the end of the session, participants will be able to state what SMART stands for in the context of writing training objectives.
- ✓ By the end the end of the session, participants will be able to write a SMART objective.

Session planning

Review the Context of the Session

Does it link with the preceding sessions? Was the objective of the last session actually achieved'? Do any points from the last session need to be covered again in this session? Was there enough time, can the time be increased or the number of objectives reduced? Review the level and number of your participants, both will affect the type of work you can do.

Define the Aims and Objectives/Outcomes/Targets

Every planned session must have its outcomes/objectives clearly stated. Every outcome/objective must be achievable within the time stated.

Plan the Introduction

Refer to participants' previous experience or to previous course sessions. Introduce the objectives and explain its relevance so that participants know where the session is taking them. Indicate how learning will be assessed.

Plan the Learning Strategies

a) Analyse the knowledge, skills and attitude components in the objectives
b) Select an appropriate methodology for each component
c) Plan the resources needed, such. as visual aids, handouts, stories, exercises projector
d) Order and time the activities: Some things need to be done in groups, some individually, some can be done at home, some require visits or special facilities.

Plan the Summary

There are many ways you can summarise key points with a group: asking concept questions, reviewing the main points in plenary, putting the main points on a handout, or writing them up on a flip chart.

Plan the Follow Up

Most sessions need to be followed up by participants outside the training programme in order to consolidate their learning. This is particularly true if there is a gap between training sessions. This might consist of directed reading, practice or a project that would apply the learning.

Plan the Assessment

Some form of assessment of whether individual participants have achieved the learning objectives should be built into each session. It may come during the session by writing, by observation, by questioning and discussion. It may come later at the end of the session or the course but should be planned now to help you focus on the students outcomes/targets.

Write a session plan

'This is to help you get things in a logical order, and so that someone else can take over your work if you are prevented from doing it.

Learning needs analysis

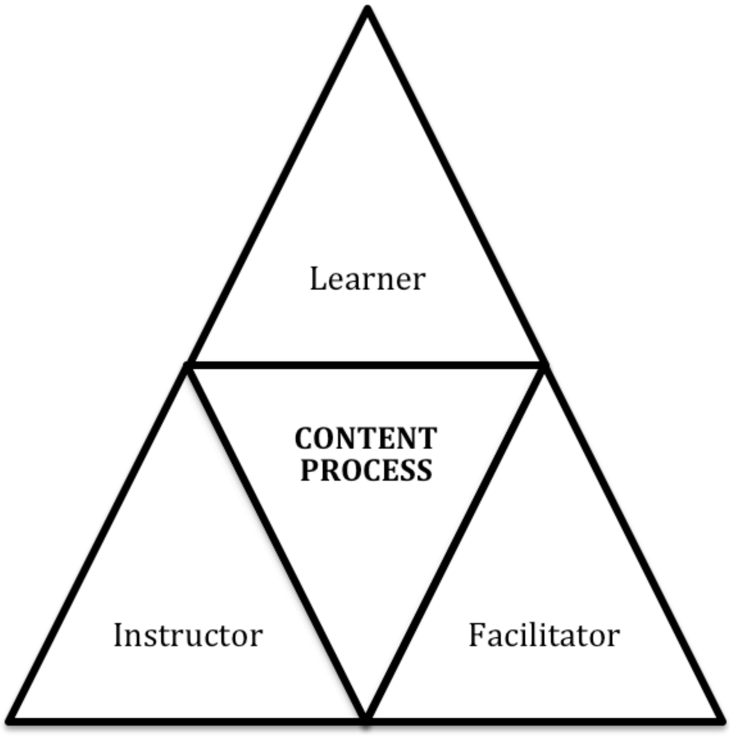
A learning needs analysis is the starting point of the training cycle and it influences all stages of the cycle. An effective training needs analysis will answer the following questions:

- **what** needs to be done? – an analysis of the current situation, which may necessitate a task/job/role analysis
- **who** needs to do it? – can be done either by an internal or external person, understanding of the task requirements is essential
- **why** does it need to be done? – to enable appropriate learning opportunities to be planned, to provide a justification for training and development
- **how** will it be done? – observation, questionnaires, interviews, performance appraisals and debriefs
- **when** will it be done? – to inform the planning process for training and development activities
- **where** will it be done? – in the organisation/field
- h**ave** we done it? – evaluation of achievement of the aims and objectives through assessment and review

Key methods and tools for learning needs analysis

- **observation** – structured observation of records, facilities, events, people and processes
- **questioning & listening** – for information and for gauging attitudes and knowledge
- r**ole/job/task analysis** – obtaining, recording and interpreting information about key elements and standards of role, job or task.
- **supervision and performance review** – structured process of performance objective setting and regular monitoring and reviews
- **reflective thinking & ranking techniques** – tools for structuring analytical processes of problem solving
- **self-assessment** – an essential method in needs analysis, using the learners' assessments of their current performance and of their future needs
- **recording** – keeping accurate records for planning and evaluation

The roles of the trainer



The trainer has three main roles when delivering training, which need to be balanced according to the learning process and the content.

Instructor

The trainer is responsible for providing instruction, through the presentation of facts and theory and the demonstration of skills and attitudes. Key instructor tasks are to give clear directions on activities and to lead on the assessment of learning.

Facilitator

The trainer acts as a facilitator by steering the learners through questioning, discussion and activities. Key facilitator tasks are to manage the group process in tasks and exercises, ask guiding questions and give constructive feedback.

Learner

The trainer is also a learner, encouraging dialogue and exchange of experiences. Key learner tasks are to find out the prior experience of learners and to encourage sharing of thoughts and opinions.

Content and process

The trainer is responsible for managing the learning process throughout and for delivering the content of the training. The trainer's primary responsibility is to ensure that the learners are being taken through every phase of the learning cycle – **E,R,G,A: Experience, Reflect, Generalise, Apply.**

Selecting training techniques and methods

Appropriateness of the content	Choose an activity that is applicable to the audience. Your objective is to involve all participants and not to exclude any one because the do not understand jargon or situations.
Relevance to the topic	Ensure that the activity can be tied to the topic you are training. If the subject is not perceived as being relevant to the training it will be dismissed and the tone you have set will impeded learning.
Relevance to the group	The material must be relevant to the participants' capabilities. You should consider: knowledge, position or level, culture and language expertise.
Expectations of the trainees	It may be hard to establish trainees' expectations prior to the training session, but the more you know about the intended audience the better you can select appropriate activities.
Familiarity of trainees	It is useful to know where the trainees in the group are acquainted with each other before the training session. If they have not met before early activities should be selected in order for them to get to know one another.
Previous exposure to activities	Participants who are 'expert trainees', that is they have attended several training sessions, may have seen most activities. You need to be aware of their experience to avoid them being 'blasé'. Some activities for example, case studies and role-plays can be used over and over; whereas specific games or activities for a particular outcome should not be repeated.
Confidence levels of trainees	Many participants lack confidence initially in training programmes. They do not want to embarrass themselves. They need time to build confidence and trust with colleagues and trainer.
Willingness to participate	The participants willingness to participate is often tied to their level of confidence. People are more likely to participate in a relaxed non-threatening environment. But you should also be aware of why trainees are attending training. If they have been forced to by their managers and they are unwilling attendees, this will obviously influence their willingness to participate.
Ability to complete	Activities must be able to be completed during the time available. It is very frustrating to get involved in a experiential situation and then be told you have run out

	of time to complete the situation. In order to be fully prepared to run an activity, trainers should 'dry-run' the activity with colleagues to have an accurate feeling for time and possible outcomes.
Ability to solve	Activities, especially case studies and role-plays must be able to be resolved by the trainees. If they are presented with problems which they are unable to resolve either individually or collectively then you will set them up to feel frustrated and the learning experience will be a negative one.
Briefed	All activities must be presented with clear, precise instructions. For activities which involve participants adopting a 'role, such as role-plays, scenarios, games, the roles to be played must be clearly explained.
Debriefed	For all methods of active or group learning the activity must be comprehensively debriefed for maximum learning. Often the activity must be debriefed on several different levels, personal, immediate, applied to the real work situation. The handouts on Debriefing provide more specific hints.

Selected training methods

The following list with descriptions of training methods does not pretend to be comprehensive – but provides additional information to support the module sessions. The methods listed below are predominantly the ones outlined in the session plans.

Role play

Description

A role play is an enactment of a situation which allows participants to explore different behaviour and emotions in a given set of circumstances. A key characteristic of this method is that people act out roles, and an assigned observer gives feedback after the role play.

Roles can be assigned or participants can create their own roles. In either case participants should understand that role plays are not about *acting* but simulating normal behaviour.

Role play is useful for attitudes and skills training.

Considerations

- Give clear instructions
- Role play encourages empathy, imagination and observation in an environment and, as a result, can be a powerful learning tool.
- Role play is economical and can be creative and fun.
- Role play can be risky if it is not facilitated carefully, allow people privacy when carrying out the role play
- Role play is only useful if participants receive valid constructive feedback at the end of the role play. This can be given and discussed on an individual basis, with a plenary discussion about learning points to reinforce learning.
- Role play can require considerable preparation and time to carry out
- Role plays should begin with a detailed briefing and provide an observation checklist for maximum results

Tips!

- Role play requires a sensitive briefing and debriefing process - don't forget to plan time for this when designing the session
- De-role role players before debriefing

Case studies

Description

Case studies describe a real or imagined scenario. Scenarios can be provided in narrative or image form, by the trainer or produced from the group. They provide an opportunity for groups to analyse and problem solve, applying theory to hypothetical practise.

Case studies can be used to develop understanding, skills and knowledge and can provide an invaluable relevant opportunity to reinforce learning.

Considerations

- Allow sufficient time for groups to work through the case studies
- Time must be factored for group presentations
- Vary the ways groups report back but ensure that every group has an opportunity to present at least part of their work
- Case studies that relate directly to a real situation can be valuable for their realism but can stop participants learning as they bring their own lens of experience to the case study rather than approaching it direct. Political sensitivities can also be a problem.
- Scenarios that are created can be useful to provide ‘distance’ for the participants but there can be a danger of oversimplifying issues.

Tips!

- Don’t overload the scenario with too many details
- Ensure that the information in the case study is accurate and relevant to the learning points - if it is not, there is a danger of losing credibility

Ice breakers/energisers

Description

Short activities which encourage participants to move around, relax, take a break from what they are doing or get to know one another better. Some may have relevance to a topic, some may develop skills and others are designed to change the pace or focus of the training.

Energisers and games can be particularly useful after a long presentation, or to start the first afternoon session of a workshop. As a general rule, energisers should be chosen with sensitivity to the cultural, gender and religious norms of the group. People's physical abilities should also considered.

Considerations

- Energisers can be as simple as allowing the group to go outside for five minutes
- Can be used as a quick skills development exercise.
- They can be flexibly used, when you see participants 'snoozing' make them leap up to do an exercise
- The relevance of the exercise can be lost on participants, and they can be seen as silly or a waste of time.
- Some energisers involve a lot of physical activity, which needs to be carefully controlled.

Tips!

- Always try to use an energiser in the after lunch session to avoid the 'graveyard' syndrome
- Only use ice breakers that you personally are comfortable with, otherwise they can be unconvincing for participants!

Brainstorming

Description

This is a useful technique for generating creative ideas, information and hopes and fears by encouraging participants' contributions in response to an idea, question or supposition. The results of brainstorms can be used in a variety of ways, ranging from ice breakers, idea creation, finding solutions, to assessing people's existing levels of attitudes, skills and knowledge.

It is important to clarify the use of the brainstorm for participants, so they know what to expect and can see the purpose of the exercise. The role of the trainer is that of *facilitator*, framing the exercise but only contributing ideas to spark the group.

All brainstorms should have a purpose, even if it is only a way of introducing a topic. Ideally brainstorms should be followed by an exercise that uses the information gathered in the brainstorm.

Considerations

- Define the topic/problem/issue as a statement or question.
- Clarify whether it is a controlled brainstorm (you will censor contributions depending on their appropriateness) or uncontrolled (you will take any idea no matter how wild).
- Give people time to think (and write if necessary) on their own, or in a pair or group.
- Summarise ideas/sentences into one word equivalents, check that any changes are approved by the person offering the contribution.
- Use the results from the brainstorm as a basis for any ensuing activity so participants understand the point of doing the brainstorm.

Tips!

- Set clear parameters before doing the exercise (controlled vs. uncontrolled)
- When doing an uncontrolled brainstorm do not to evaluate input as it is given

Structured discussions

Description

Discussions are designed to initiate and focus debates or to emphasise key learning points. They can be conducted either in plenary or small groups, and should allow participants time to relate learning points to practise or vice versa.

Discussions in plenary need to be managed by the facilitator, however where discussions take place in small groups a facilitator should also be nominated to chair the discussion and ensure that tangents are not pursued too vigorously!

Structured discussions in small or plenary groups can be used to develop understanding. It is a useful technique for finding out how a group is responding to a contentious subject, or for covering all the angles on a particular topic. Discussions can be set up in different ways to achieve different aims, encouraging less talkative members of a group to talk, providing a competitive edge, targeting particular issues of a topic etc.

The facilitator generally initiates the discussions by asking pre-determined questions and only influences or controls the discussion to summarise points or if there is a need, such as a misunderstanding, rambling or irrelevant chit chat!

Some discussion regulator tools are:

- A pre-arranged system whereby people indicate that they want to speak, and wait their turn to be asked.
- 'The conch system', whereby only the person holding the 'conch' (stick, ball etc.) can speak. They then pass the 'conch' to the next person to speak.
- Taking turns to speak in order, (e.g. round the circle, numbering etc.).
- Using cards with topic headings to discuss more than one aspect of a subject.

Considerations

- Do not be afraid to stop a discussion that is not productive or run with a discussion that occurs spontaneously
- Formulate the discussion questions *before* the session as they are not easy to formulate on the spot!
- Discussions are a flexible facilitation tool and can occur at any time in a session
- Discussions are an excellent way of stimulating interest and participation, gauging the feelings in the group and relating learning to practise
- Discussions can provide instant feedback for the trainer.
- Discussions utilise the diversity in a group and can be challenging and thought provoking for individuals.

Tips!

- Regularly summarise and draw out the key discussion points
- Be tough on people dominating the discussion

Questions and answers

Description

Facilitators can use questions in a planned way to elicit information, encourage thinking processes and to assess levels of knowledge and understanding. It can be a direct and immediate way of clarifying, gaining factual information, allowing participants to share their experience or knowledge and it is an excellent way of starting discussions

Although facilitators are often the one asking questions, and handling answers this should not always be the case. It can also be useful to throw questions from participants back to the group, and give the control to the group.

Considerations

There are a range of types of questions that should be used as needed, as listed below.

- Open questions – allow learners to flexibility in their answers and thus give the trainer a clearer idea whether a learner has understood a topic. These questions are often prefaced by who, what, why, how and when?
- Closed questions – will provide the trainer with yes, no short answers. These are useful if you need facts i.e. is this an aim? However they are not generally useful for checking more complex understanding or learning i.e. Do you understand?
- Reflective questions – to make people reflect on what is being said, through recapping or other
- Pick up questions – to return to a previous point/discussion. These can be useful at quiet moments, or to encourage participants to make links between subjects.
- Direct questions – these are normally directed at one individual with the purpose of inviting them to join in or wake up! Obviously these questions can be intimidating, although this may be the effect you desire, however they can also give someone the chance to shine when a trainer knows they will be able to answer.
- Questions provide a direct and immediate way of clarifying and gaining factual information.
- When pre-planned, questions can be used to test understanding and levels of learning.

Tips!

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

Working with groups, pairs and individuals

Individual work

This method can be used independently or in combination with any of the methods explained below. Individual work is when participants work on their own, typically on short questions or self tests which demand personal responses or reflection. The methods allows for:

- Individual input encouraging everyone to participate
- Individual time for quiet reflection
- Feelings or behaviour which they don't wish to reveal to others but which they do want to remember for themselves

Round-the-table

The benefits of round-the-table input and discussion are that it:

- Takes less time than group work
- Allows participants to contribute personal examples
- Ensures wider sharing of experiences
- Allows the facilitator to control the process and therefore the time

How to do round-the-table:

- Ask for responses around the table starting at one end and moving to the other in progression
- Ask for volunteers to respond
- Make it clear when the topic is sensitive that is up to them to choose the issues that the want to disclose
- Acknowledge everyone's contribution, either by the raising of hands or a simple nodding of agreement. Sometimes when common responses are anticipated or occur, it may not be necessary to get a response from everyone. However, it is important to acknowledge responses. - People will soon lose interest in activities if they feel their efforts are going unrecognised or un-rewarded.

Pair work

Participants work with their immediate partner, working logically from one side of the table. (A group of 3 may be necessary depending on numbers). Benefits of pair work are:

- People feel less vulnerable discussing in pairs than in plenary session
- It helps to build up trust and understanding before organising group work
- Helps individuals to gain confidence

How to do pair work

- Ask people to "talk to their neighbour" or group participants in two's or threes.
- Invite the groups to share their ideas, views and opinions on a specific topic
- Circulate around the groups.

Snowballing

Snowballing is simply a term that means that the discussion gets bigger as you involve more people (in the same way as a snowball gets bigger when it is rolled in snow). The benefits of using the snowballing technique are that it:

- Demands everyone's participation
- Allows everyone to contribute
- Generates ideas because of the sharing of ideas in the paired and/ group discussion
- It focuses responses because of the peer monitoring

How to do snowballing

- Pose a question and allow participants to consider the question individually.
- Have participants discuss the same question and their individual responses with a partner.
- Ask pairs to join and consolidate and present their responses as a group.
- You may or may not need a plenary discussion to n allow for a full group summary
- Give very clear instructions about what is expected as outcome
- Give very clear time limits and stick to them

Buzz Groups

Buzz groups differ from syndicate group work in that they meet for a short time - about 5 minutes. The entire group is divided into small groups of 3 or 4 people who talk quickly about a topic. There is then a buzz of discussion around the room. If you plan to use buzz groups frequently, arrange the seating so that it facilitates this. Benefits of buzz groups are:

- Results are quick
- Short discussion on a topic energises people
- They can be used spontaneously

How to conduct buzz groups:

- Plan carefully the exact question or topic you want them to discuss
- Give precise details of what you expect from their discussion
- Limit responses to no more than 3
- Stick to time limits
- Get responses from all groups

Small groups

Experienced participants can often be allowed to form their own work groups. However, guard against homogeneous groups where more mixed groups are desirable. Simply 'count off' the participants into small groups, i.e. 1,2,3, (or 4 if 4 groups will be required.) if the groups do not need to be balanced in any way. Considerations for small group work:

- Number the groups and allocate them a working space. This may be in the same room, but in the case of lengthier, more complex tasks it is advisable to have groups work in separate rooms if they are available
- In general it is preferable to re-assign groups to allow participants to work with different people, especially in a 3 to 5 day workshop; although, you will want to keep the same group working through several related tasks.
- The optimum number for group work is 5 or 6. The minimum is 4 (3's can work if you have no alternative, but people feel more exposed and less of "a group.")
- The maximum is probably 8. Beyond 8, it becomes difficult for everyone to contribute effectively and timing becomes a problem.
- When language is an issue, more time may have to be allowed for tasks and the ensuing discussions to be translated - often into and from more than one language.
- Even where this is the case, it is important to allow and encourage everyone to contribute. Encourage everyone to contribute to the discussions
- Insist that everyone takes on the roles of reporter and presenter. It is important for you to enforce this at the beginning as some groups will appoint the most outspoken person or most skilled in the working language as the presenter and this can result in only their opinion being expressed
- Control the dominance of one group over another.

Practical considerations

Most group work involves presentations using flipcharts to present the key points. Flipchart paper as well as large felt-tip marker pens must be available to all work groups. Flipcharts must be available in the main training room for the work-group presentations as well as short presentations by the facilitator or invited speakers. It can be useful to display the results of group work presentations as they allow participants to view them at a later time and also allow the facilitator to tie in points throughout the seminar. Use masking tape or 'blue tack'. The quality of a presentation can be improved by its readability. Instruct groups to produce large legible text. Perhaps the best way of doing this is by creating a flipchart with some basic hints.

How to do group work

- Give clear instructions about the make up of the groups
- Clearly allocate groups a work space and materials
- Give clear instructions to the group about the task
- Prepare a handout if different groups will work on different tasks
- Use a flip-chart or board if the groups work on the same task
- Include clear instructions about recording and reporting

- Insist that all participants are responsible for each role at some time
- Set clear time limits
- Assign a time keeper
- Give instructions about the readability of the flipcharts.

Facilitation methods

The following facilitation methods described are useful when trying to work though problems to find solutions. Some may sound a little wacky, but be brave and try them out – it is amazing the results they can produce.

Causes/Solutions

Write the problem that has been identified on the flip chart and then divide the paper into two halves, one half headed Causes and the other Solutions. Get team members to contribute to both columns. Each contribution should be discussed and agreed before being added to either column,

Future Visioning

Ask participants to imagine they are at some point in the future (e.g. 2010). They should imagine that all their problems are resolved, dreams have been achieved, goals have been achieved. Now step back and describe how we did it. It is important to spend some time on placing the participants in the future. Use the past tense when asking how we did it. This technique can be useful when problems seem insurmountable or when the group has low morale.

Mind Map

Facilitate discussion with a group and record the output in a large mind map drawn for all participants to see – on a flip chart or large sheet of paper pinned to the wall. Mind maps are an expression of radiant thinking, a natural function of the human brain, and they allow creative ideas to bloom and flow. They provide a basic ordering of information and easily allow later additions as the session progresses.

Greenfield Site

This is one way to facilitate the type of discussion described above. Ask participants to imagine the problem and then imagine there were no history, rules, regulations, culture or climate. If none of these things existed because we were just starting up what might we do, how might we approach the solution.

Celebrity Views

Split the group into smaller sub-groups. Each sub-group decides upon a celebrity (dead or alive, fact or fiction). Each sub-group then explores the characteristics of their celebrity and decides how the celebrity would view the problem at hand. Each group then presents their solutions to the plenary. This method can be used in a variety of different ways i.e. participants can imagine what someone they admire might do etc. It is a useful technique for viewing a problem and solutions from a fresh angle.

Big Picture

Another way to take a fresh approach to solution finding is to facilitate discussion in the group and record the output as a big picture for all participants tot see. This provides a graphic representation of the problem and enables participants to visualise solutions, stimulating further ideas. This will appeal to participants for whom the visual channel is important and generate fresh ideas. It is also useful for building ownership.

Facilitator competences

Competence 1: Effectively use core methods

The Facilitator is competent in designing and leading larger or smaller group processes and events: a conversation or discussion, a meeting, a workshop, a design conference, an environmental review, a strategic planning session or a macro programme of consultation. Behind this is a complete familiarity with the process of creating and sequencing questions that move the group from surface considerations into the substantive implications of any topic.

The capacity to distinguish process from content is of prime importance, and the discernment to decide which bracket of facilitation methods and techniques best fits the client's needs.

Competence 2: Manage the client relationship and prepare thoroughly

The facilitator has to be able to care in depth for the client organisation. This involves knowing how to customise programs to fit the client's situation, and how to close the deal and deliver on the contact. It also presumes the courage to say "no" to a deal if facilitation is not an appropriate solution or will not work. It means preparing every aspect of the program ahead of time.

Competence 3: Use time and space intentionally

It is not enough to merely select a good space for a group event. The facilitator has to know how to create the event environment. If the space is not clear and tidy the facilitator has to do it, and, at break times, keep on doing it to ensure that the environment remains an ally of the event. It is important to know how to best arrange the space so that it works for both the process and the group. This means checking the space ahead of time and making sure there are walls appropriate for holding data charts, sufficient lighting and so on. It means arranging tables and chairs to communicate intentionally and maximise face-to-face participation. It also means skilfully using décor tuned to the nature of the event and communicating its significance.

The facilitator also has to be the metronome of the group, sensing the rhythm that is most enlivening at a particular time of day; pacing the activities so as to capitalise on the "beat" of the group; apportioning available time both to get the job done and to reach timely closure.

Competence 4: Evoke participation and creativity

More than a methodologian, the facilitator also has to be an evocateur, with an unshakeable belief that the group itself has the wisdom and creativity needed to deal with the situation. What is involved here is the ability to create a climate of participation. The facilitator knows how to elicit the latent wisdom in the group by catalysing everyone's participation and involving the whole group in taking responsibility for its own decisions. The ability to create a group climate conducive to both participation and creativity requires a bag of tools up every facilitator's sleeve. Eliciting the wisdom of the group is the name of the game. It is here that the facilitator's skill is most needed. Objective skills are in setting enabling contexts that corral and focus the group's insights toward a specific topic and a focus question.

Competence 5: Respect the group and affirm its wisdom

Appropriating a group's diversity as a gift is more than just a skill, and much more than what is involved in the facile "I'm OK-you're-OK". It stems not only from methodological necessity, but from a root recognition of the implicit wisdom and greatness of each human being, and a trust in the group process. This requires a foundational stance of affirmation, a constant decision to reference situations positively, and the habit of responding with the "yes" before the "no".

Competence 6: Maintain neutrality and objectivity

A key role of the facilitator is to provide objectivity to the group process. While one side of the facilitator is more like an orchestra conductor who wants a first-class product, the other side is more like a dispassionate referee who knows the importance of maintaining a neutral stance toward what is coming out of the group process. The facilitator sets aside personal opinions about the data from the group, being careful not to react negatively to people's insights, and maintaining detachment from the group-generated data. This same neutral universe contains the capacity to buffer criticism, anger and frustration with a non-defensive stance whenever the group energy overheats.

Competence 7: Read the underlying dynamics in the group

The facilitator is practiced in sensing dynamics in the group. In particular, the facilitator is versed in interpreting the silence of the group, identifying individual "axes" and hidden agendas, and not only sensing the groups' uncertainty at particular points but taking steps to clarify it. Deft at picking up non-verbal cues, the facilitator listens with a "third ear" to pick up the significance of what lies behind participants' words. On the more active side, the facilitator is skilled at interpreting negatively phrased responses for the underlying insight and probing vague answers for their fuller meaning.

Competence 8: Orchestrate the Event Drama

Paramount to engaging the group's commitment to the process is the development of audience rapport. The facilitator engages this rapport from the start, creating icebreakers that loosen a group up. Then, as the group goes through its alternating ups and downs, the facilitator is inventive in shifting time and mood intentionally to get the job done, savvy in using personal illustrations to release the group, and sagacious in using humour catalytically.

Competence 9: Release blocks to the process

The facilitator has creative ways to release blocks to the process. This demands a light touch to gently discourage side conversations. It calls for shrewd tactics to discourage "speechifying" and argumentation, and demands tactful ways to discourage the dominance of particular individuals, to handle "difficult" people and to deal helpfully with conflict.

Competence 10: Adapt to the changing situation

Facilitation involves a balancing act on the highwire. Ancillary to all the skills so far described is the capacity of the facilitator to be flexible to changing situations. The facilitator knows how to balance the process on the one hand and the results of the process on the other; to harmonise the needs of the participants at any one moment with the total demands of the task. This is based on a foundational understanding that the process for arriving at the results is just as important as the results themselves.

Competence 11: Assume responsibility

Facilitating a process for an organisation is much, much more than using a bag of tricks to occupy the audience for the day or two. The facilitator has the maturity to assume responsibility not only for the process, but also for the overall task, the participants and the outcome of the event. This assumes the willingness to take on a big load, to take responsibility for every single aspect of the program, to deal successfully with ambiguity, to use one's critical intelligence to make hard decisions and then to take the consequences of those decisions. This assumes a solid personal discipline and strong spiritual base. This also requires that the facilitator separates 'self' from the importance of the group process.

Competence 12: Produce documentation

Coming up with a finessed group product - a documentary record of the group's insights - is a bottom line of facilitation. With the help of an assigned documenter who inputs the group data and decisions in tandem with the process, the participants can be handed a hard copy product before they leave. Vital to this is the ability to keep track of all the group-generated data and enough versatility in using computer programs, typewriters and copiers to produce the final charts and documents.

Competence 13: Model professionalism, self confidence & authenticity

The development of a professional self-image, self-confidence, and an intentional style and dress is an important asset of the facilitator. But more important is the willingness to play the role of a model of authenticity for the group. The facilitator takes on whatever role the group requires to provide a walking image of authentic selfhood in the midst of practical tasks.

Competence 14: Maintain personal integrity

Finally, the facilitator knows the secret of maintaining personal integrity; and has learned how to authentically process and relate to rejection, hostility and suspicion; how to let go of personal feelings arising from a programme; and how to take care of personal renewal.

[Excerpts of Brian Stansfield's article published in the Facilitation News, International Association of Facilitators]

Challenging behaviour

Following are some general rules that you may find useful when confronted with challenging behaviour in a workshop. It is important to de-link behaviour from the person, they are often behaving in a difficult way because of a specific reason such as anxiety or a misunderstanding.

- Anticipate – from the moment you start the workshop observe and listen to participants to anticipate potential troublesome behaviour.
- Let the group manage the individual – often it is not necessary for a facilitator to intervene as the group will also be annoyed and manage the individual themselves.
- Work the breaks – it is important to make contact with participants in the breaks. It also makes you more accessible to people, they bring up issues with you personally rather than in plenary.
- Encourage humour – it is a wonderful way of diffusing anger, and makes for a more informal, safer learning environment.
- Depersonalise the role of the facilitator – it is easy to take negative comments personally, remember you are performing a role, negative comments are normally about an issue – not you.
- Simple design – keep the design of your workshop simple, people do not like to feel they are constantly being asked to 'jump through hoops', they need to understand why they are doing things and what the outcome will be.
- Drop the plan – if you need to be prepared to change tack completely if you see the needs of the group are not being met.
- Allow complaining – and then draw a line. Once people have had sufficient opportunity to air grievances or doubts move the group on to look at positive solutions and don't allow people to slip back into the complaining stage.
- Introduce ground rules – these can be useful for bringing people to order.
- Understand that there is often a good reason why someone is behaving in a difficult way, make it your business to find out why.
- Maintain the learning environment – ensure that timing is observed, the room is kept clear and tidy, lighting is as good as possible, people have regular breaks and energisers where required.
- Introduce a device for dealing with difficult issues – such as a 'parking lot' or a session specifically to answer concerns and questions.
- Trust the group – who will often manage the problem very effectively. Remember most people are reasonable!

It is important when an individual is challenging you to understand how the behaviour makes you feel, as this will make you better equipped to handle the situation.

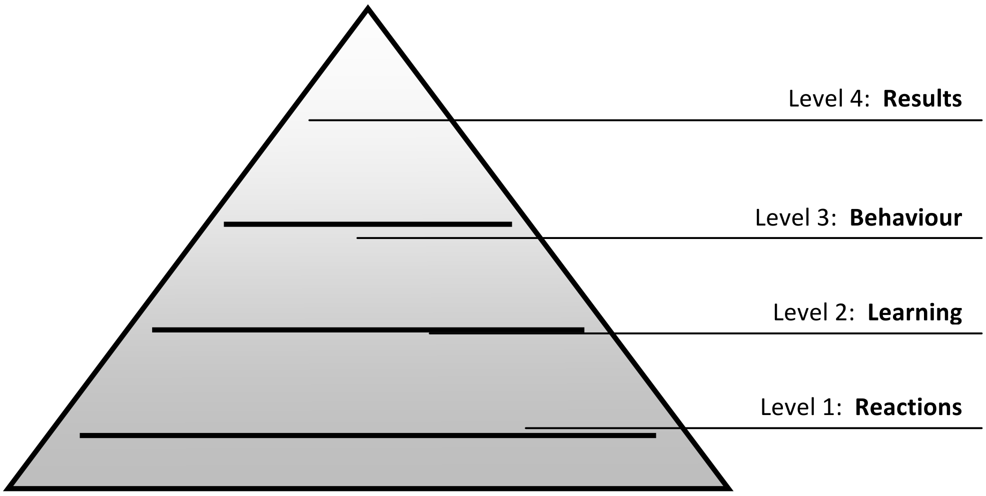
Evaluating training

Different levels of evaluation

Training can be evaluated at different levels. We want to know whether participants were happy with the training they received but also that they learnt something. We want to find out what changes the training leads to and, ultimately, what impact it has.

Kirkpatrick's four levels of evaluation

In 1959, in his doctoral dissertation, Donald L Kirkpatrick presented a model of evaluation that comprised four levels. Forty-five years later, Kirkpatrick's approach to training evaluation remains widely used and quoted, perhaps because it is simple and complete.



Understanding the four levels

Level 1 (Reactions) looks at participant satisfaction with the training and their immediate reactions to it.

Level 2 (Learning) looks at what has been learnt. What do participants know now that they didn't know before the training? What new skills have they mastered?

Level 3 (Behaviour) looks at what participants are doing differently as a result of the training. How has what was learnt on the course been transferred to their everyday life and work.

Level 4 (Results) looks at the impact that the training has had on participants' performance and the community in which they are working.

Level 1 evaluations

This is perhaps the most common form of training evaluation. End-of-course evaluation forms or 'happy sheets' are used to collect feedback from participants on topics including content, methodology, trainer style, course materials and facilities. Trainers use this feedback to make improvements to courses and judge their own performance.

Level 1 evaluations help to answer important questions such as 'Were the training objectives met?', 'Did participants feel comfortable with it?', 'Was it useful and relevant?'

Level 1 evaluations do provide valuable quantitative information and can link to higher levels. It is possible to ask what new skills and information have been gained (Level 2), what participants plan to do differently (Level 3) and what improvements they seek or expect (Level 4).

However, Level 1 evaluations do not measure the learning, guarantee changes in behaviour or quantify results.

Importantly, Level 1 evaluations communicate to participants that their feedback is valued.

Level 2 evaluations

Level 2 evaluations set out to measure what has been learnt as a result of the training. What can participants do now that they could not do previously? How have participants' knowledge increased and what new perceptions, insights or understanding have they gained?

Questionnaires, quizzes, practical tests, role-plays and simulations that check for any change in knowledge, skill or attitude are useful at this level.

The link to other levels comes in terms of satisfaction in doing something they could not do before (Level 1), trying out new methods and behaviours (Level 3), achieving better results. Level 2 evaluations do not say whether people liked the training, or guarantee a change in behaviour or expected results.

Level 2 evaluations are made easier and more reliable by assessing knowledge, skills and attitudes before and after training, by some form of follow-up (eg survey, interviews) and, if feasible, a control group.

Level 3 evaluations

Level 3 evaluations are concerned with behavioural change. How has actual workplace performance improved as a result of the training?

Post-training assignments that require and test newly acquired learning are useful, particularly if they link to work objectives. Checklists, surveys and interviews can also be used to gather Level 3 information.

Level 3 evaluations tell us what learning transfers from the training room to the workplace and so links to Level 2 (Learning). Because it focuses on behaviour, it does not always tell us whether people understand (also Level 2) or if the change in behaviour achieves desired results (level 4).

Level 3 evaluations are made easier by observing somebody doing their job and applying what they learnt during the training. If first-hand observation is not possible or practicable, survey key people who do observe performance, such as supervisors, team leaders or line managers. Observations should be made after ample time has elapsed.

Try to gather information about performance before training and then repeat evaluations at appropriate intervals afterwards.

Level 4 evaluations

Level 4 (Results) is concerned with measuring the extent to which changes in performance have contributed to improved results and increased impact. The definition of results will depend on the particular goals of the training.

Level 4 evaluations are often difficult because of the problem of isolating the effects of the training. This happens because time is needed for the results to be realised by which time other factors may also have played a part in improving results. Pre-training performance is important since it provides the initial benchmark against which training effectiveness can be measured.

Level 1-3 evaluation results can provide evidence for Level 4 evaluations. In itself, a Level 4 evaluation does not tell us whether people liked the training (Level 1), demonstrate understanding (Level 2) or prove that particular or preferred behaviours were used (Level 3).

As with Level 3, Level 4 evaluations require the involvement of others to provide evidence that will enable before and after comparisons to be made.

Summary

Donald Kirkpartick describes four levels of evaluation:

Level 1: Reactions

Level 2: Learning

Level 3: Behaviour

Level 4: Results

Each and all of the four levels are important if a reliable and useful evaluation is to take place. The model is, therefore, a way of planning and structuring a comprehensive training evaluation.

Bibliography of books on training and learning

Name	Author	Publisher	ISBN Number
The Accelerated Learning Handbook	Dave Meier	McGraw Hill	ISBN 0-07-135547- 2
The Inspirational Trainer	Paul Z Jackson	Kogan Page	ISBN 0-7494-3468- 6
Participatory Learning and Action	Jules N. Pretty, Irene Gujit, Ian Scoones, John Thompson	International Institute for Environment and Development	ISBN 1-899825-00-2
The Facilitator's Pocketbook	John Townsend and Paul Donovan	Management Pocketbooks	ISBN 1-870471-70-9
The Trainer's Pocketbook	John Townsend	Management Pocketbooks	ISBN 1-870471-37-7
The Accelerated Learning Fieldbook	Lou Russell	Jossey-Bass/Pfeiffer	ISBN0-7879-4639-7
Turning Training into Learning	Sheila W. Furjanic and Laurie A. Trotman	Amacom – American Management Association	ISBN 0-8144-0519-3
How to be better at giving presentations	Michael Stevens	Kogan Page and The Industrial Society	ISBN 0-7494-1900-8
How to measure training results	Jack J. Phillips and Ron Drew Stone	McGraw Hill	ISBN 0-07-138792-7
A Consultancy Approach for Trainers	Keri Phillips and Patricia Shaw	Gower	ISBN 0-566-02737-2
Opening Space for Democracy	Daniel Hunter and George Lakey	Training for Change	www.TrainingForChange.org
The Theory and Practice of Training	Roger Buckley and Jim Caple	Kogan Page	ISBN 0-7494-4156-9
Icebreakers	Ken Jones	Kogan Page	ISBN 0-7494-0803-0
The Skills of Training	Leslie Rae	Gower	ISBN 0-7045-0556-8
Understanding Facilitation	Christine Hogan	Kogan Page	ISBN 0-7494-3826-6

Useful websites

The following websites are chosen as they provide free resources, articles and tips for trainers and facilitators. Many have links to other useful websites.

Seeds for Change: www.seedsforchange.org.uk

Provides training and support to grassroots campaigners, NGOs and other community groups and organisations. The site includes free resources including practical tips for facilitating meetings and workshops.

Infed: www.infed.org

This stands for Informal Education and is an open, independent and not for profit site put together by a small group of educators. Use the search function on the home page to explore the site and find what you are looking for.

Businessballs: www.businessballs.com

This site has a wealth of free resources and is being updated all the time. Though not exclusively for trainers, this site is a good place to look for training games and exercises, and had ideas for evaluating training.

ERC: http://erc.msh.org/fpmh_english/chp6/index.html

This is the Manager's Electronic Resource Centre. Run by Management sciences for Health, it is aimed at health professionals. However, the training advice and resources on the site would benefit any trainer working in the field.

The Active Reviewing Guide: http://reviewing.co.uk

This contains lots of tips, articles and resources to help with training, facilitation, active learning and, of course, reviewing.

Icebreakers and Energisers

Ice breakers or energisers are short activities which encourage participants to move around, relax, take a break from what they are doing or get to know one another better. Some energizers may have relevance to a topic, some may develop skills and others are designed to change the pace or focus of the training.

Such activities are useful to generate feelings of trust in the group so that people feel more willing to share their own experience. An example of such an activity might be asking participants to talk about their experience of travel or hotel accommodation (everyone has a story!) to 'break the ice' before a story telling activity.

As a general rule, energizers should be chosen with sensitivity to the cultural, gender and religious norms of the group. People's physical abilities should also be considered.

Here are some examples of Icebreakers and Energizers:

'Tick Tock'

Participants sit in a circle. The facilitator takes two markers and hands one to the person on their right saying: "this is a tock". The person who takes it from the trainer says: "A what?". The trainer replies: "a tock". The person then continues the process to their right. Then the trainer turns to their left and hands the second marker to that person, saying: "this is a tick", etc. Continue until a 'tick' meets a 'tock' and see what happens!

I like people who…

One person stands in the middle of a circle of chairs. The person standing says, "I like people who like…" e.g., "I like people who like chocolate." Everybody who likes chocolate then has to move across the circle to another chair. The person who is left standing then chooses their own like.

Something new

This is good for groups who know each other. Get participants to speak to as many people in the group as possible, finding out something new about each person. Keep the time quite tight (e.g., five minutes) and make sure people keep moving.

Fruit salad

This exercise is an excellent energizer. Ask all the participants to form a circle and ask each to sit on their chair or cushion. Make sure that there are no extra cushions or chairs. Starting with yourself (standing in the middle of the circle with no chair or cushion), allocate the name of a fruit to each person in turn. There should be four fruit names, for example, mango, apple, pineapple, orange.

Explain that when you call out the name of a fruit (for example, mango), all the mangoes should stand up and change places. They are not allowed to sit back in the same chair. However, the caller in the middle should also try to sit down on a vacant chair. Because there is one less chair than people, this means that one person will end up without a chair. That person must stand in the middle and call out the name of a fruit. Again, all the people with that fruit name must change places, and so on.

At any time, the caller can shout "fruit salad". Then everyone must change places! Continue for a few rounds or until everyone is exhausted!

Elephants and giraffes

Everyone stands in a circle. One person calls out the name of a participant followed by "elephant" or "giraffe". When "elephant" is called, the named person holds out one arm like a trunk. The people standing on each side make the elephant's ears using their outside arms. When "giraffe" is called, the named person raises both arms above their head with their hands clasped to make the giraffe's head. The two people on either side extend their outside legs forwards to make the giraffe's legs. Anyone who is slow or does the wrong thing has to call out the next name and animal.

Move to the spot

This energiser takes five minutes. Ask participants to spread around the room and to pick a particular 'spot' that is 'theirs'. Then ask people to move around the room, doing something suggested by the facilitator, such as: "Say hello to anyone wearing red; Hop, skip or jump; Whistle or make a strange sound; Walk backwards", and so on. When the facilitator says "Stop!", everyone has to get back to their 'spot' as soon as possible. This game can be fun if it is not done for too long - people will get bored quite quickly.

'Ha!Ha!Ha!'

This energiser is useful for changing pace or if there is tension in the group. The facilitator explains that s/he is going to make them laugh. The facilitator starts by saying "Ha!" and getting the next person to repeat this, adding another "Ha!". Participants then repeat what their neighbour says, adding another "Ha!" each time. In this way, people are 'made' to laugh and very quickly everyone will be laughing. It really works!

'Making rain'

This is similar to the 'Ha!Ha!Ha!' energiser. Everyone sits in a circle and the facilitator starts by drumming her/his fingers on a table or chair. The next person starts to drum their fingers, then the next, until everyone is drumming their fingers. The sound is like that of heavy rain or a thunderstorm. End the exercise when everyone is 'making rain'.

'A's and B's'

This energiser can also be used to form random groups. Find an open space for this exercise. Participants should silently choose one person in the group to be their 'A' and one person to be their 'B' (there are no criteria for selecting As and Bs). Once everyone has made their choice, the Facilitator explains that people should now try to get as close to their 'A's" as possible and as far away from their 'B's'. People should be encouraged to move quickly - the only rule is that they are not allowed to touch anyone. After a few minutes, participants are asked to reverse the process (getting close to the 'B's' and far away from the 'A's"). This exercise will make people move about in unusual ways and should generate a lot of laughter.

Recaps - Reviewing Learning

It is imperative that trainers review whether or not learning is occurring. During training space should be allocated at the beginning of every day for a learning review. Following are some suggestions for different ways of assessing whether participants are learning. The learning review should take approximately 15 minutes at the start of the day.

The Snowball Fight

Ask participants to take out a blank piece of paper. They should write one word or short sentence that was a particularly important or illuminating learning point from the previous day on the paper. Ask participants to assure that the writing is legible. Now explain that the group is going to have a 'snowball fight'. Ask the participants to scrunch up their papers to make a ball, demonstrating how to do it. Now begin the snowball fight by throwing your snowball at someone, and continue energetically with the whole group until everyone has warmed up. Finally ask each participant to pick up a snowball, open it up, and read it out to the group.

Chronological Order

Split into small groups. Distribute colored cards to each group. Ask the groups to write on the cards all the things they did yesterday. Each activity or session should be written on one card – allow 10 minutes. Ask all the small groups to meet in the plenary and lay out the cards in chronological order on the ground. Once the day has been summarized in a path, ask the participants to follow the path and silently reflect on their learning. Participants can share their main learning with the group after reflection.

Ranking

Ask pairs to think of five things they remember from yesterday. Allow 5 minutes. Ask the pairs to meet up with another pair and list the 10 things that they remembered, although their list should not contain duplications. Allow a further 5 minutes.

Now ask these groups of 4 to meet with another group of 4 and list the additional items from this group to make a final list. Allow a further 5'. Ask each group of 8 to read out their full list to the plenary.

The Quiz

Develop some questions on the content of the previous day and run a quiz -- either in groups or as individuals.

Draw a Memory

Give out one sheet of plain A4 per person and a pen. Ask participants to work with the pen in the hand they do **not** usually write with. Tell them they have 5 minutes to draw a memory from yesterday's learning. This could be a picture or a symbol. Once everyone is ready ask each table to review the drawings of the participants on the table and guess the learning points illustrated. Each group then chooses their 'favorite' drawing. Display the 'favorite' picture from each table on the wall in a gallery. Ask participants from other groups to guess the learning points illustrated. Now have a final plenary vote to decide on the winning picture that the group likes best!

The Map (this method is best used on the last day)

Split into small groups. Ask the groups to draw a map of their journey through the training on a flip chart. Stress that they can be as creative as they like, the only rule is no words! Allow 10 minutes.

Then ask all groups to display their charts and explain their journey in plenary. Often groups create very funny and graphically interesting maps of their journey.

Additional reviewing methods that can be used between sessions/days include:

Talking Wall

The talking wall is a group exercise that provides opportunities for all participants to respond to open questions or statements from the facilitator, to evaluate a session, to record attitudes to a given topic, or to comment on a given aspect of the training session. The exercise is conducted in such a way that all comments are public for others to read and supplement in an interactive way.

Several flip-chart sheets are prepared as posters by the facilitator in advance. Each poster contains an open statement printed at the top (e.g., "What I think is missing from this workshop is…"). The sheets are placed around the walls of the room where everyone can read them. Each participant is given a marker and invited to walk around the room adding appropriate comments to each sheet. Or each person may be given a supply of Post-it notes and a pencil to write comments on separate Post-its that are then posted on the most appropriate sheet. Everyone should be encouraged to read the comments written by others. This technique is thought-provoking and good fun to do for virtually all groups.

Feedback Rounds

Rounds provide a quick and simple method of gathering an instant reaction from all participants to the current state of the course or group.

At a suitable point in the program – usually at a natural break or between exercises or before moving on to a new topic – the facilitator announces that s/he would like to hear from all the participants how the course (or the most recent part of it) is going. The idea is to receive quick, impressionistic responses, *not* analytical or detailed answers.

Choose your Corner

Set up four flip-chart sheets, one in each corner of the room, each with the title of a session from the previous day (or a subject area). Ask participants to go to the subject that most interested them the previous day. The group gathered around each sheet brainstorms about the main things they learned about the session. These are written up on the sheets. Feedback from each group should be requested in sequence.

Bus Stop

Using the same format as "Choose your corner", participants are allocated to four groups. Each group spends two minutes at each "bus stop", brainstorming about learning points. Each group moves around to the other bus stops in turn, adding anything they learned to the lists. Ask each bus stop to feed back to the group.

Clap, clap, <word>

Everyone stands in a circle and is given one minute to think of one word (only) that summarizes how they feel as a result of the training session. Start a round by clapping hands twice and asking the first person to say their word; then clap twice and the next person says their word, and so on around the circle. Get a good rhythm going: Clap, clap, <word>, clap, clap, <word> … going around the whole group.

Stop the clapping and ask each person, in turn, to explain briefly why they chose their word. End with another round of clap, clap <word> (repeating their chosen word).

Continuum Cards

These can be used to check participants' views of the workshop. The facilitator should write pairs of cards and set them out as a continuum on the floor with a few meters between the cards. Examples of pairs would be: very interesting ←→ very boring; very relevant ←→ not relevant. Participants are given a blank card and asked to vote (anonymously as far as the facilitators are concerned) by placing their card on the appropriate place on the continuum.

Splitting Groups

The way the trainer splits the main group into smaller working groups can be done in a variety of ways. Some suggestions follow:

Numbering

Simply 'count off' the participants into small groups, i.e. 1, 2, 3, (or 4 if 4 groups will be required.) if the groups do not need to be balanced in any way. People call out or are assigned numbers in sequence, up to the number of groups needed (e.g. for four groups, 1, 2, 3, 4; 1, 2, 3, 4, etc.). Then all the 1s form one group, the 2s another, and so on. Alternatively, use letters of the alphabet or names of fruit. After you have split the groups, clearly indicate where each group should work.

Travel line-up or birthday

Ask the participants to form a line in order of who has travelled furthest to the venue (or birthdays ib chronological order). When the line is complete, the trainer asks each participant where they have come from, and then counts off however many are needed in each group.

The ship is sinking

Clear a large space, climb onto a chair and explain that you are the captain of a ship and the ship is sinking. Ask everyone to clap and repeat after you 'The ship is sinking, the ship is sinking'. Explain that the only way for people to save themselves is to jump into a lifeboat containing a precise number of people – you will call out the number required. Start the chorus and then yell out a number e.g. eight. Everybody should now rush to find seven other people to form a lifeboat. This should provoke much noise and laughter. Repeat a few times with different numbers until you feel the group is ready to stop, and then yell out the number you want for small group work.

The world-famous Mexican shoe exercise

This is a good way to allow groups to self-select. Explain that shoes have many different characteristics, e.g. color, shape, heel, laces, etc. Ask participants to find two other people with similar shoes to their own to form groups of three. Allow a few minutes of wandering before checking that everyone has a group.

Sweeties!

This is a good way to split up groups later in the afternoon when energy is low and a sugar boost is needed! It requires a mixed bag of chocolate mini-bars (like Mars, Twix, Bounty, Marathon etc.), or a small bag of sweets or biscuits with 4 or 5 different coloured-paper wrappers. Hand round the bag of sweeties and let everyone take one. When everyone has one and before eating is allowed to commence, participants must find all the other participants with the same sweetie as they have! Then sitting in their new groups eating and work can begin! A healthy alternative is to use pieces of fruit (apples, tangerines, bananas and kiwis for example!).

Introductions and Expectations

Any of the following options can be used to introduce yourself and participants.

'Time to venue' line (Introductions)

Ask participants to form a line with the person who took the longest to arrive at the workshop (door to door) at the front of the line, and who took the shortest time to arrive at the end of the line.

Ask participants to find a person who is not standing near them in the line to interview. Ask them to spend five minutes interviewing the other person to find out the following information:

- Name, role/job title and organisation
- Experience in the topic of the training
- Something unusual about the person

Once the interviews are complete, randomly select pairs to introduce each other until everyone has been introduced.

Favorite things (Introductions)

Ask everyone to take a piece of paper and draw a chart with three columns and three rows on the paper. Explain that in the left hand column they should write three categories of their favourite things (e.g. food, colours, books, music etc.). They can use their imagination but you can start them off with an example or two. In the next column they should write one of their favourite things from the category. An example of what this could look like is given below:

E.g. Food	E.g. Ugali	Collect names of people from the group in this column
E.g. Color	E.g. Blue	

Once participants have completed the first two columns of the chart, they should circulate in the group to find people who have the same 'favourites' as them. The aim is to find the most people with similar 'favourites' as themselves. There will be a prize for the first one to complete the process (i.e. have lots of names in each square).

Ask participants to find one other person to interview from the group (preferably someone they have not met before). Ask them to spend five minutes interviewing the other person to find out the following information:

- Name, role/job title and organisation
- Experience in the topic of the training
- Something unusual about the person

Once the interviews are complete, randomly select pairs to introduce each other until everyone has been introduced.

Round Robin (Introductions)

Simply go around the group asking each person to introduce themselves citing whatever you feel is relevant. This is obviously a quick and easy method if you are short of time.

Time machine (Expectations)

Ask the participants if they have ever travelled in time. Tell them we are going to travel to…(here you have to mention the date of the last day of the training/workshop and one hour after the time you have expected the event to end).

Now ask participants to travel in time. Invite them to do so by raising both arms when you say “1,2,3 go”… Ask someone what day it is today (they have to say that moment at the end of the workshop that you have set…not the actual moment!) In case people mention the current moment, invite them to travel in time again by raising the arms, say again “1,2,3 go”… Usually, after a maximum of 3 times everybody understands what you are trying to do.

Then you can start “acting” by saying… “Oh, I know you have attended a workshop…how did it go?” And they may say: interesting, exhausting, challenging…. Make a note of these words on a flipchart.

Then ask: “Why was it like this? What made it go this way?” Again record their answers. These may be helpful to establish the ground rules later on. You also may have already some responses leading to the expectations… use them to introduce the next step: “What did you learn? What did you got out of the workshop?” Write their answers as they may be the expectations.

Invite them to travel back in time. Again, say “1,2,3 go”… and ask people to raise their arms as before. Check they are really back and nobody is lost travelling in time. Make fun of this.

Conduct a plenary discussion on the exercise. While doing this put emphasis on their responses to the 3rd question. Check they feel those are their expectations. Invite them to add some.

During the break or at the end of the first day you should prepare a flipchart grouping the expectations by topic /area…

Later on, when you establish the ground rules, you can come back to questions 1 and 2.
On the last day, during the evaluation sessions, do not forget to evaluate the fulfilment of their expectations.

Appropriate Time Required
Flexible, dependent on group size. Maximum time 30 minutes.

Options:
If you have enough time and adequate technology, you can produce a video of the participants. Interview each participant as if they are in the future, talking about “that workshop they have attended”. You may need time during the week to edit and produce a short video with at least 2 minutes of each participant. You may use the video in the closing session so they can evaluate the achievement of their expectations. This takes much more time but it is a good souvenir.

What I Expect (Expectations)

Draw a simple matrix on a flipchart using the four areas outlined below. Some sample answers are provided as examples – they will help you get participants started though you may wish not to include them on the matrix at the beginning.

From The Course
Knowledge
New Skills
From The Trainer
Expertise
Experience
Direction
From Others

Confidentiality
Honesty
From Me
Participation
Support

Ask participants to complete their expectations of the course, of the trainer, from others and from themselves.

Discussion Questions

1. Did anyone feel uncomfortable doing this exercise? Is so, why?
2. Can anyone explain why it is good for us to set expectations?
3. How can we use these expectations for the rest of the training event?

Tips for giving instructions

One of the first things a trainer has to remember is that the most common reason that training methods fail is because the trainer has not given clear instructions. You may be using a cunningly crafted role play or a case study that has been a long time in development but it can all come crashing down if the instructions are not given effectively! Here are some tips to ensure your instructions are always clear, concise and contribute to a conducive learning experience!

- Signal that you are going to give instructions
- Say the instructions a minimum of three times
- Don't have movement into groups at the same time as giving instructions
- Give both verbal and written instructions if they are complex
- Get participants to explain back to you what they have to do
- Stage instructions, give them piece by piece
- Components of instructions:
    - What to do
    - How long
    - WHY
    - How to report back
    - Outputs required
- Clarify whether or not a task can be flexibly completed…or do all the elements have to be completed
- Practise giving instructions before the session

Tips on Using Microsoft PowerPoint

How do I start…

…my presentation?

Press the **F5** key. Or click the **Slide Show** icon or select **View Show** from the **Slide Show** menu

…go to the next slide?

Press any of these keys: **N**, the **space bar**, **return**, or **Page Dn**. Or do a **left click** on the mouse. If your mouse has a scroll wheel, rotate it *towards* you.

…go to the previous slide?

Press **P**, **Backspace** or **Page Up**. Or rotate the mouse wheel *away from* you.

…go to a particular slide in the presentation?

You will need to know the number of the slide you wish to go to. Type the number, press **return** and it will take you there.

Or you can use the navigation menu. Press **A**, **=** or just move the mouse for a second or two. A button will appear in the bottom left corner of the screen. Click on this and select **Go Slide Navigator / By Title**. A **right click** on the mouse produces the same menu.

If you haven't started the presentation, highlight the slide that you wish to start on and click Slide Show.

If you want to use just part of an existing presentation, you can create a custom show and choose which slides you will show. Select **Custom Show** from the **Slide Show** menu.

…switch to a blank screen during a presentation?

Pressing **B** will turn the screen black. Use this in a darkened room. Pressing **W** will turn the screen white, which is better if the room is lit.

…underline text or draw on a slide while I am talking?

This can be useful – for example, underline or circle a key word. But don't overdo it!

Hold down **Ctrl** and press **P** to change the pointer from an arrow to a pen. You can now write on the slide. (To change the ink colour, select **Pointer Options Pen Colour** from the navigation menu.)

Press **E** to erase your scribbles. Press **Esc** once to change the pointer back to an arrow.

…end my presentation?

Use the B or W key to turn the screen black or white, or press the Esc to end the slide show.

It is good practice to finish with a blank slide or, better still, one that signals the end of the presentation – e.g. Questions? or Break.

Handout: Courtesy of Stephen Blakemore

Giving constructive feedback

Feedback is one of the most effective ways of learning more about ourselves. It has been said that the last thing we learn about ourselves is the effect we have on others.

Constructive feedback increases self-awareness, offers options and encourages self development so it can be important to learn to give and receive it. Constructive feedback can contain both positive and negative feedback and it is therefore important to learn to give feedback skilfully. Destructive feedback is that which is given in an unskilled way and which leaves the recipient feeling bad. The other disadvantage to this type of feedback is that the recipient is likely to reject what has been said.

Skilled Feedback (before)

1. Be clear about what you want to say in advance, practise if necessary

State the purpose of what you are about to say.

If you are not absolutely clear about what it is you're going to say it is easy to forget the main message or deliver a confused message. Giving feedback is often as difficult as receiving it.

It is important to explain the purpose of what you are about to say so the recipient understands that you are not simply making gratuitous comments. This will also enable them to understand that feedback is a two way process and that they have a right to respond.

2. Encourage self assessment

It can be very helpful if you can encourage an individual, through using gentle probing questions to identify a pattern of behaviour for themselves rather than by telling them. This can cut down your hard work and also means the individual is more likely to commit to change as they feel they have ownership of the problem.

Skilled Feedback (during)

3. Use the positive/negative sandwich

Most people need encouragement, to be told when they are doing something well. When offering feedback it can really help the receiver to hear first what you like about them or what they have done well.

Our culture tends to emphasise the negative. The focus is likely to be on weaknesses more often than strengths. In a rush to criticise we may overlook the things we like. If the positive registers first, negatives are more likely to be listened to and acted up.

It is useful to apply the sandwich throughout giving feedback, prefacing each negative with a positive and ending on a positive note so the recipient does not feel totally disillusioned.

4. Be specific

Avoid general comments which are not very useful when it comes to development. Statements, such as "Could do better" or "Reasonably good" may be pleasant or dreadful to hear, but they do not give enough detail to be useful sources of learning. Pinpoint exact what the person did which led you to use the label.

5. **Be descriptive rather than evaluative**

Give the person specific examples of what you saw or heard and the effect it had on you, rather than merely saying something was 'good or bad', etc.

6. **Select priority areas**

Don't save it all up and give the person one huge bumper bundle, especially if there is considerable negative feedback to be given. This is not only likely to alienate the recipient entirely, but also may mean they will never again value any feedback you give them.

7. **Offer alternatives**

If you do offer negative feedback then do not simply criticise, suggest what the person could have done differently. Turn the negative into a positive suggestion.

8. **Own the feedback**

It can be easy to say to the other person "You are....," suggesting that you are offering a universally agreed opinion about that person. It is important that we take responsibility for the feedback that we offer. Beginning the feedback with "I think...." or "In my opinion...."is a way of avoiding the impression that we are telling the person a "universally agreed judgement" about themselves.

Finally

9. **Leave the recipient with a choice**

Gain commitment to change where agreement is reached. Feedback which demands change or is imposed heavily on the other person may invite resistance, and is not consistent with the belief that each of us are personally responsible for choosing what we do. It does not involve telling somebody how they must be to suit us. Skilled feedback offers people information about themselves in a way which leaves them with a choice about whether to act on it or not.

It can help to examine the consequences of any decision to change and identify appropriate ways forward for the individual. Gaining commitment by encouraging the individual to repeat back to you any planned change can help to reinforce commitment to that change.

10. **Recap on good points**

End on a cheerful note by reminding the recipient that it's not all bad!

Remember

Failure to give negative feedback can result in:

a) No change in the person's behaviour because they have never heard that it is causing difficulties.

b) An enormous confrontation in the future as things build up until we blow up.

c) Problems in our continuing relationship with the person which naturally develop when we are aware of something and they are not, or when we are trying to keep something from them.

Feedback should be non-judgmental, clear information to another person about how their behaviour affects you. Giving feedback is not an end in itself, but the beginning of a new agreement between two people.

Receiving constructive feedback

If you are receiving feedback you can help yourself by:

1. Listening to the feedback rather than immediately reacting or arguing with it

Feedback may be uncomfortable to hear, but we may be poorer without it. People may think things without telling us and then we may be at a disadvantage. Remember that people do have their opinion about you and will have their perceptions of your behaviour, and it can help to be aware of those. However do remember that you are also entitled to your opinion and you may choose to ignore it as being of little significance, irrelevant or referring to behaviour which you wish to maintain.

2. Be clear about what is being said.

Avoid jumping to conclusions or becoming immediately defensive. If you do people may cut down their feedback or you may not be able to use it fully. Make sure you understand the feedback before you respond to it. A useful technique can be to paraphrase or repeat the criticism to check that you have understood it.

3. Check it out with others rather than relying on only one source.

If we rely on one source then we may imagine that the individual's opinion is shared by everybody. In fact, if we check with others we may find that others experience us differently and we will have a more balanced view of ourselves which can keep the feedback in proportion.

4. Ask for feedback you want but don't get.

Feedback can be so important that we may have to ask for it if it does not occur naturally. Sometimes we do get feedback but it is restricted to one aspect of our behaviour and we may have to request feedback we would find useful but do not get.

5. Decide what you will do as a result of the feedback.

When we receive it we can assess its value, the consequences of ignoring or using it, and finally decide what we will do as a result of it. If we do not take decisions on the basis of it then it is wasted.

In the final analysis it is always your choice whether to accept or reject the feedback.

Finally thank the person for giving the feedback. We might benefit from it, it may not have been easy for the person to give, and it is a valuable practice to reinforce in any organisation or relationship.