Table of Contents

TAB 1 (Day One)

TAB 2 (Day Two)

TAB 3 (Day Three)

TAB 4 (Days 4 and 5)

TAB 5: Additional Resources

Delivering Effective Training

Think about your experience as a trainer or as a trainee.

- What makes training successful?

- What keeps training from being successful?

Course Objectives

1. Present key ideas and concepts from the IDSR Facility-level Training materials

2. Describe the elements and value of the Experiential Learning Cycle and how it applies to the training modules.

3. Use facilitation skills to:

    - Encourage participation when delivering interactive presentations/lecturettes
    - Generate interaction among participants
    - Guide learners through an experiential session.

4. Practice the training techniques in the IDSR Facility-level Facilitator's Guide

5. Assess your strengths and areas for potential improvement in your training delivery skills.

6. Clarify roles and responsibilities in the delivery of the IDSR Facility-level Training

7. Develop a specific plan for delivering the course

IDSR District TOT Schedule

Hours	Monday	Tuesday	Wednesday	Thursday	Friday
8:30 am	Welcome & Getting Started Course Objectives, Schedule & Guidelines Presentation of IDSR Facility-level Training Materials	Schedule for the Day The Experiential Learning Cycle Facilitation Skills Facilitation Skills Practice Sessions	Schedule for the Day Use of Materials and Audio Visuals Team Training and other Key Training Techniques Practice Round One Group I	Schedule for the Day Debrief from Practict Training Round One Prepare for Practice Training Round Two Practice Round Two Group I	Schedule for the Day Practice Round Two (Cont'd) Group IV Reflections on Round Two Practice Loose Ends and Unanswered Questions
12:30 pm	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH
1:30 pm	Discussion of IDSR Facility-level Training Materials The Adult Learner	Preparation for Practice Round 1	Group II Group III Group IV	Group II Group III	Loose Ends & Unanswered Questions (Cont'd) Roles and Responsibilities Application Plan & Next Steps Evaluation
5:00 pm	Close	Close	Close	Close	Close

Guidelines for Working Together

In pairs, identify behaviors for working together that you would like this group to adopt to make this an effective learning experience for you and others.

IDSR Facility-level Training Materials

Use this page to make note of any additional questions/comments you have about the content of the training materials.

Key Ideas

The most important points to be learned from the IDSR Training Materials include:

-
-
-
-
-
-
-
-
-

The Typical Adult Learner

Describe the typical adult learner you will be working with in the IDSR Facility-level Training. How will he/she best learn?

What would characterise an effective learning event for these adult learners?

Effective Training for Adults

- Makes explicit links between real world and content.
- Is participatory – provides opportunities to share or contribute ideas.
- Includes practice in the use of skills or of frameworks.
- Integrates and makes links between sessions/topics.
- Uses a mix of methodologies.
- Matches method to content in ways appropriate for the learning you are trying to achieve.
- Challenges participants to be analytical.
- Helps participants identify the relevance/importance/applicability to their work.
- Balances individual and group context for learning.
- Supports theoretical frameworks with concrete examples.
- Provides materials/resources that eliminate obstacles to learning.

Day One: Reflections

1. Based on the discussion of the key ideas and concepts of the IDSR Facility-level Training, what will you pay attention to in your delivery of the training?

2. What did you learn about the value of the using the experiential learning cycle in training sessions?

3. In addition to the IDSR Facility-level Training Course, how will you use the experiential learning cycle in your work after this training?

Notes

Notes

Notes

The Experiential Approach to Training [1]

By: James A. McCaffery

Introduction

Experiential learning is exactly what the name implies -- learning from experience. The experiential approach is learner-centered and allows the individual trainees to manage and share responsibility for their own learning with their teachers. Effective training strategies that incorporate experiential learning approaches provide opportunities for a person to engage in an activity, review this activity critically, abstract some useful insight from the analysis, and apply the result in a practical situation. (Gudykunst and Hammer, 1983, provide a brief historical review of the experiential approach.)

A graphic representation of the model is presented below and may be applied to cross-cultural training in the following ways:

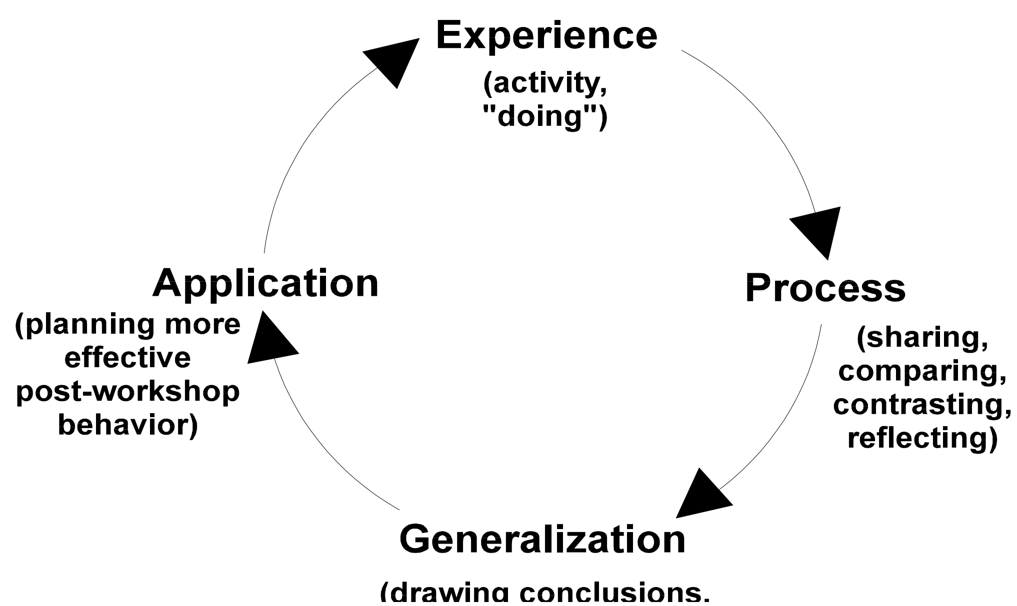


Figure 1
The Experiential Model

---

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

Experience

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

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

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

Process

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

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

Generalization

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

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

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

- Asking and helping individuals to summarize what they have learned into concise statements or generalizations.
- "Pushing back" at people to help make their thinking more rigorous.
- Relating the conclusions reached and integrating them into a theoretical model.
- Making sure, within reasonable time boundaries, that everyone who wishes to share significant insights gets a chance to contribute.
- Helping the group compare and contrast different conclusions, identifying patterns where they exist, and identifying legitimate areas of disagreement.

Application

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

Techniques used to facilitate the application stage include the following:

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

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

Conclusion

It is important to stress one other point about the experiential model. The exact nature of each phase of the model is driven by the goals of the training or orientation session/program. Once the goals are defined, then the session can be designed using the model as the framework.
In order for this model to be effective, it needs to be rigorously applied, both in the design and delivery stages. "Experiential training or learning" is a phrase often heard in the educational and training world; yet, it is frequently misused in practice where it seems to mean letting people

participate in a presentation, having a question and answer session after a lecture, or a role play or case study *by itself* without the subsequent steps in the model. Most frequently, the generalizing and application stages are simply left out of the design or the program; as a result, the power of experiential learning is significantly diminished or is negated altogether.

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

Design Components of an Experiential Session

1. Climate Setting

Stimulates interest, curiosity, induces participants to begin thinking about the subject at hand. Provides a basis for the presentation of session objectives by drawing out reasons for the need to explore the subject and how it will be useful to them. It also produces valuable data about the participants experiences or viewpoints on a given subject, generating examples to which the trainer can refer during the rest of the session:

- Greet people as appropriate, putting people at ease.
- Ask questions related to the subject, and particularly to participants' experiences related to the subject.
- Link this training session to previous ones and place it into the overall framework of the workshop.

2. Objective Clarification

Presents to the participants statements that describe the intent, aim or purpose of the training activity. "Sells" the session to participants by linking to points discussed in the climate setting activity and in pre-course needs assessment conversations so that they see the relevance to their work or other real-life situation. Provides opportunity for participants to seek clarity on objectives, add additional issues or raise concerns:

- Write legibly, explain clearly with a rationale, and keep in view during the entire session.
- State in the objectives what the learner will be able to do or say using action verbs and make sure they are measurable, realistic and time-bound.

3. Interactive Presentation

Provides a framework, either a theory or a model, that becomes a basis for the experience that follows:

- Make a short, concise presentation centered around a few key points using examples to which participants can relate, ending with a summary.
- Pose questions to the group.
- Supplement the presentation with visual aids and handouts.

4. Experience

Provides opportunities for participants to "experience" a situation that simulates a real life situation. It is aligned with the objectives of the training session and usually builds on the interactive presentation. This "experience" becomes the data producing event from which participants can extract and analyze as they complete the learning cycle:

- Use "experiences" such as case study, critical incident, skit/drama, role play, skill practice, demonstration, small group task, team challenge, site/field visit, exercise, simulation, paper and pencil instrument, etc.
- Structure the experience with a road map that follows an appropriate delivery sequence.
- Give clear task instructions, related to the objectives of the session, which will guide the processing phase.

5. Processing

Causes participants to reflect on the experience, to think critically about it, and to share their reactions in a structured way with the whole group. It usually starts by looking at the task given for the experience, focusing on the content, the result. Then it continues with the comparing and contrasting of different approaches or ideas, guided by carefully prepared questions. It is also a time to help participants explore what happened when they tried to do the task, what was easy, difficult, and why. Finally it is also an opportunity to challenge participants to think about other ways they might have approached the task, and what the impact might have been on the result:

- Structure a report out discussion that focuses on the content.
- Lead a discussion in which the experience is analyzed and reflected on thoughtfully by the group.
- Help people share their individual experiences and reactions to the experience on an affective level.
- Challenge people to think of alternative approaches or results.
- Make a transition away from the experience so that participants are ready to generalize.

6. Generalizing

Extracts conclusions and generalizations derived from or stimulated by the previous phases of the cycle, linked to the objectives of the session. Helps participants step back from the experience and discussion, identifying patterns related to everyday life or to a theoretical construct.

- Ask open-ended questions that help participants think critically in order to draw generalizable conclusions.
- Help individuals summarize what they learned into concise statements.
- "Push back" to help make their thinking more rigorous.
- Record responses both to generate further discussion and to give people material they can use in application planning.

7. Applying

Draws upon insights and conclusions they have reached during the previous phases to incorporate into their lives for more effective behavior in the future:

- Ask questions that encourage participants to place themselves in their everyday life situations and identify what they will do better/differently as a result of what they have learned.
- Help people establish a time line for their application plan and identify people who can help support and monitor their progress.

8. Closure

Briefly summarizes the events of the training session. Links back to objectives and seeks to determine if they have been met. Wraps up training session and gives a sense of completion. Links session to rest of program especially upcoming sessions:

- Summarize the main points and learning of the session.
- Review the objectives.
- Conclude, or provide a bridge to the next session.

Facilitation Skills For Trainers[2]

By James A. McCaffery

Introduction

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

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

Question Asking

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

Closed Questions

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

Example:

Trainer: *Do you think that recommendation will work?*
Participant: *No.*

Open-ended Questions

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

Trainer: *What did you like about that recommendation?*
Participant: *I think it is a good strategy for resolving the issue, one that can be Implemented without expending a lot of resources.*

Trainer: *What kinds of goals did the group set?*
Participant: *They set a wide range of goals. The first was...*

Summarizing

The purpose of summarizing is to:

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

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

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

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

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

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

In many instances, that is because there was not really agreement during the discussion.

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

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

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

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

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

Paraphrasing

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

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

You are saying...

In other words...

I gather that...

If I understood what you are saying...

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

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

Example:

Participant: *It seems the basic problem is that some of the people don't know how to use the management information system,*

Trainer: *In other words, you see the problem as lack of know-how.*

Another example:

Participant: *I think the most important thing is to tell the staff member clearly and directly how he is contributing to the problem.*

Trainer: *So you are saying it's important to tell the staff member directly what kind of impact he is having on the problem.*

Encouraging

In order for the above facilitation skills to be successful they need to be supported by a number of other encouraging facilitation skills, some verbal, some non-verbal. The trainer, through facial expressions, body language, and comments, encourages the speaker to say more about the situation. Examples are:

- Nodding one's head.
- Picking up on the last word or two of someone else's sentence.
- Repeating a sentence, or part of a sentence.
- Asking someone to say more about that.
- Saying: That's good -- who else has something to add?
- Maintaining eye contact, open body position.
- Saying Uh huh.

Suggested Open-ended Questions - Clarifying and Exploring

1. Background
- What led up to _________?
- What have you tried so far?
- How did it happen?
- What do you make of it all?

2. Identification of Problems
- What seems to be the trouble?
- What seems to be the main obstacle?
- What worries you the most about ________?
- What do you consider the most troublesome part?

3. Example
- What examples can you give us?
- For instance?
- Like what?
- What is an illustration you can give us?

4. Description
- What was it like?
- Tell me about it.
- What happened?
- How might you describe it in your own words?

5. Appraisal
- How do you feel about it?
- How does it look to you?
- What do you make of it all?
- What do you think is best?

6. Clarification
- What if this doesn't make sense to you?
- What seems to confuse you?
- What do you mean by ______?
- What do you make of it all?

7. Alternatives
- What are the possibilities?
- If you had your choice what would you do?
- What are the possible solutions?
- What if you do and what if you don't?

8. Exploration
- How about going into that a little deeper?
- What are other angles you can think of?

9. Extension
- What more can you tell me about it?
- Anything else?
- What more you would like to discuss?
- What other ideas do you have about it?

10. Planning
- How could you improve the situation?
- What do you plan to do about it?
- What could you do in a case like this?
- What plans will you need to make?

11. Predictions and Outcomes
- How do you suppose it will all work out?
- Where will this lead?
- What if you do - or what if you don't?
- What are the chances of success?

12. Reasons
- Why do you suppose you feel this way?
- How do you account for this?
- What reasons have you come up with?
- What is the logical solution to this?

13. Failures, Preparation for
- What if it doesn't work out the way you wish?
- What if that doesn't work?
- And if that fails, what will you do?
- What are some alternatives?

14. Relation
- How does this fit in with your plans?
- How does this affect your work?
- How does this stack up with your picture of yourself?
- How do the two plans relate?

15. Evaluation
- In what way?
- How is this for you?
- According to your own standards, how does it look?
- How would you evaluate all of this?

Preparing to Facilitate an Interactive Presentation

You will be facilitating a discussion with a small group of no more than four people on a topic you will choose. You will have 10 minutes to facilitate this discussion, and 5 minutes to receive feedback from the participants.

To prepare for this practice, first choose a topic from among the options provided to you. Using the facilitation skills guidelines, think about and prepare for your practice facilitation. You have 20 minutes to prepare.

What are the key points you are going to present?

What questions will you ask to elicit participation and discussion?

How will you use the other facilitation skills during your practice?

What I am Learning about Facilitation Skills and Interactive Presentations

Record some of the feedback you received on your facilitation practice.

What you are doing well:

Areas for improvement:

What are you discovering about using facilitation skills to elicit participation?

What skill areas do you want to pay particular attention to as you both prepare for and practice your training session this week?

Making Interactive Presentations

Adults prefer short, concise presentations when acquiring new information or when learning a new theory or framework. Their prime listening time ranges from 10 to 20 minutes; therefore it is best to make the most out of that period of time, and that does not mean dumping as much information as possible in a few minutes. It means making a careful selection of what will truly add value from the learner's perspective and distilling the essence from the material in order to effect the greatest possible impact.

Adults have a need to interact quickly with new material in order to relate what they are learning to their life experiences; therefore, they appreciate the opportunity to respond to questions that help them draw on their experience. Furthermore, adults benefit greatly from listening to the responses of their fellow learners. They also want to hear examples to which they can relate, that help them make comparisons with their own situation and to begin visualizing and internalizing the material. In order to absorb and retain information, adults need to see the material summarized in a way that is clear, simple, brief, and attractively presented.

These needs present challenges to trainers, who are often confronted with the pressure of conveying a large amount of information in a short period of time. There always seems to be too much and the decisions are not easy about what to present and how.

What you need to think about as you prepare your presentation

1. Determine how the presentation fits with overall session objectives:

- Why the presentation is important to this group of participants.
- How it builds toward the experiential activity that follows.
- The learners level and experience with the subject matter.

2. Organize the content and structure the presentation:

- Identify the key points of the presentation.
- Decide what visual aids you plan to use and how to present them.
- Devise a plan for starting the presentation.
- Choose examples that will enrich the content.
- Prepare questions to ask participants.
- Anticipate questions or issues participants may raise.
- Plan how you will conclude and make a transition to the next part of the session.
- Practice and check the timing to make sure the presentation is not too long.

What you need to think about during your presentation

- Make sure everyone can hear you and see you - show your interest in the material by varying your voice tone and using open gestures.
- Monitor how much you are talking and how much time you are giving the participants to interact.
- Use all of the facilitation skills including asking questions, paraphrasing, summarizing and encouraging.
- Keep track of your visual aids and keep the principal ones accessible and visible throughout the presentation.
- Pace yourself so that the presentation does not use up the time you want to devote to the experiential activity that follows.

Some techniques for making your presentations more interactive

1. Pose questions to the group. Facilitate the group to answer the question rather than answering it yourself.

2. Create discussion points in your presentation. Pick something that is an important learning point; ask the group their opinion. Get part of the group to analyze it from one direction and another part of the group from the opposite. Facilitate participants as they present their views to one another. You can then give your opinion.

3. Give problems to solve. Have the participants work out the problem individually. Then ask for answers. Take several. Add your input to theirs.

4. Occasionally give participants short (one, two or three pages) content pieces to read and then discuss it.

5. Have participants turn to the person they are sitting next to and think through a problem or an issue. Then ask for several responses. Add your input to theirs.

6. Ask the participants questions, draw points out of them. Let this make up the basic content of your presentation.

Facilitating Plenary Discussions

In delivering effective training, there are a number of occasions when it is important to draw upon facilitation skills. One such occasion is in facilitating plenary discussions. Plenary discussions are discussions that the trainer leads with the whole training group. They can occur during a presentation or experience, when processing and generalizing experiences, and when a decision needs to be made by the group. Facilitating a plenary discussion can be challenging because the trainer needs to make sure that everyone is participating, that the necessary points are being made or drawn out of participants, and that the discussion stays focused and is appropriately timed – all at the same time. The following outlines some tips for facilitating effective plenary discussions.

A. Planning and Preparation

Although you cannot predict what people are going to say during a plenary discussion and the exact flow of the conversation, it is still very critical that you do some preparation for the discussion. The kinds of things you want to pay attention to in planning include:

- Timing: Consider how much time you can allot to the discussion given where you are in your training program.
- A clear idea of the kinds of points you want to be made: This links back to your objectives for your module or program. If it is a processing segment, what do you want them to discuss about the experience? If it is a discussion of content, what is the focus of the subject area? How far can you let the topic go off subject in the case that it does?
- Creating open-ended questions to keep the discussion going: Once you have a clear idea of the points you want to be made, create some open-ended questions that will help your participants get there. Have a number of probing questions prepared based on different directions the discussion may take.
- Anticipate responses and difficulties: Assume that because people are not robots and are filled with differences, there will probably be points in the discussion where it does not go where you want it to go, and/or there is some disagreement. Think through what these scenarios might be, and how you would handle them.

B. During the discussion

If you have done some thoughtful planning and preparation, the discussion is sure to go more smoothly. In addition, there are certain things you need to pay attention to during the discussion.

- Using your facilitation skills: We discussed the use of open-ended questions above – weave them into the conversation where appropriate. In addition, paraphrase comments that are made throughout the discussion to ensure that everyone understands, people feel heard, and to keep a person from talking too much. Finally, your encouraging behaviors will help people to speak up – especially those who are less comfortable speaking in the larger group.

- Calling on a number of people: As the facilitator, it is your job to make sure everyone has the opportunity to participate. If there are some people dominating the discussion, make sure you say 'let's hear from someone who hasn't spoken yet' and, where necessary, call on different people directly.

- Linking participant comments: Oftentimes during a plenary discussion, people raise issues and questions and a number of sub-topics or ideas are being discussed. It is easy to lose threads of conversations, or for someone to feel like their point was not acknowledged as the conversation moves to something else. As the facilitator, you need to link comments to one another or bring up a previous comment and link it to the current conversation. An effective technique is to use people's names. For example, "Thank you Robert for that reaction. It is similar to what Carol was saying about her experience…"

C. At the end of the discussion

In order to close down a plenary discussion, you need to make sure that everyone has said whatever he or she want to say. Asking a close-ended question such as 'any more comments' or 'is there anything else you want to add' is a good way to check on this. If people want to make additional points but time is running short, it is often effective to say 'two more comments then we must move on. If you have to cut some people off, sometimes it is effective to ask 'is it OK if I move this along?' or, say 'hold their thought – we can check in with you later but right now we really need to move along.'

Finally, it is very important that the facilitator summarize the results of the discussion. Oftentimes plenary discussions do not follow a plan or a flipchart – therefore, participants may not have followed all of the points that were made. Therefore, providing a summary for everyone before transitioning to the next step is critical. You may want to capture the summary on flipchart.

The Processing Phase

Trainers place a great deal of effort in creating or selecting experiential learning activities. This investment of time and energy is important to the success of a learning event. A key to the success of the activity is the investment made in carefully preparing a set of processing questions to help learner gain the maximum benefit and build a foundation for the generalization phase of the session.

If processing is too brief or not on topic there is a risk of getting a very small return on the investment made in the experiential activity. The feeling often is one of disappointment, that learners did not "get more out of the session". One reason for an unsatisfactory processing discussion may be that the experiential activity was not well structured or lacked depth. Another reason may be that the processing questions did not sufficiently challenge the learners to reflect on their experience. Even with well thought through processing questions, the discussion may fall flat if the trainer does not use the full range of facilitation skills, for example by simply nodding and saying "yes" to a participant's answer and moving on.

The processing phase is an opportunity to challenge learners to think, to analyze the activity they just experienced from a variety of perspectives, in short to push the learning "envelope". It is based on the session learning objectives, the content, and the dynamics that occurred between people during the activity.

When facilitating the processing phase trainers ask questions that will help learners:

- Analyze the responses to the task given for the experiential activity to increase their grasp of content;
- Compare and contrast strategies or approaches that different individuals or groups developed during the experiential activity
- Map out alternative scenarios and their possible consequences;
- Assess their effectiveness in using various skills during the activity;
- Reflect on a more affective level by share their feelings and reactions during and after the activity.

Examples of Processing Questions:

- What are your observations about ______?
- Where did you have difficulties?
- What surprised you?
- What worked?
- What strategies were used?
- What were turning points?
- How does what you said relate to ... or differ from...?
- What would have been a different way of looking at_____?
- What are some similarities that you notice in what people have said?
- What were your reactions?
- How did you feel about?

Some Sample Generalization Questions

- What have you learned about...?
- What conclusions about _________can we draw from this?
- What general advice could we give about?
- What principles can we develop from this?
- What are some significant points to remember from this section of the course On _________ ?
- From this session, the readings and the discussions we have had all week, what insights do you now have about ____________?
- If you were to synthesize all that we have been addressing in this unit, what would you say are the two most important conclusions you have reached about ______________?

Some Sample Application Questions

- How can you apply ___________?

- How can you use ___________?

- As a result of our work on ____________, what will/can you now do differently when you return to your job?

- Identify at least three "ways" that you will/can become more effective at ____________?

- What do you still need to work on during the rest of the course?

- What are some ways that you can change your approach to at work?

- Choose two things you will work on when you return to your job...identify how you will undertake these activities...how you will know if you are being successful at them (in whatever ways you are currently defining success).

Preparation for Practice Round One

1. Find another person to work with and choose a module (one of modules 3 through 10).

2. Review the design of your module in the IDSR Facility-level Training Guide. Make sure you are both clear on the points the module is making.
3. Chose segments from the module that total to a 50-minute session Highlight key points from the presentation, and choose one small group activity to practice.
4. Using the guidelines for co-training, divide up the module equally between the two co-trainers to prepare for delivery.

Guidelines for Providing Feedback

1. Support general statements with specific examples

   Precise and specific statements are valuable to the receiver for both positive behavior ("Exactly what did I do right?" or "What should I be sure to continue doing?") and negative behavior ("What precisely should I change?"). To be told "you did well on that module" may be satisfying to both parties, but it's not nearly as effective as saying "your timing was perfect and you asked provocative open-ended questions that kept the discussion going." The latter clearly describes exactly what the feedback giver sees as positive in the receiver's performance. To be told that "you go too fast" won't be useful unless it's followed up by specifics: "For example, when you asked the processing questions we needed a few more minutes of discussion before moving into application."

2. Be descriptive rather than judgmental.

   By avoiding judgmental language, you reduce the need for a defensive response. For example, regardless of merit, saying that some action was "terrible" or "stupid" or "utterly inappropriate" generally evokes anger, return accusations or passive aggressive behavior in the listener. The feedback message rarely gets through this kind of verbal clutter.

   On the other hand, describing the impact of the receiver's behavior on the performance of another makes it easier for the receiver to understand the meaning and importance of the feedback. Also, it tends to focus the discussion on behavior and not personal characteristics.

3. Be direct and to the point.

   No matter how well motivated one might be, certain actions ("beating around the bush," using lots of modifiers, talking in general terms in hopes that the person will "get the message") create misunderstanding and discomfort. The objective is to communicate directly, not leave someone guessing.

4. Direct feedback toward behavior the receiver can control or change.

   Frustration is only increased when a person is reminded of shortcomings over which s/he has no control.

What to Look for in Critiquing a Training Presentation

A. Design Considerations

1. Climate setting

- Did the climate setting questions involve participants?
- Were the questions related to the subject and to the participants' experience?

2. Objective Clarification

- Were the objectives clearly presented?
- Were they SMART and legible?

3. Interactive Presentation

- Was the presentation interactive?
- Was there a smooth transition into and out of the presentation?

4. Experience

- Was the experience well aligned with the objective(s)?
- Was it clearly defined and explained?

5. Processing

- Did the questions help participants reflect on the experience?
- Were reactions solicited on an affective level? How?
- Were there questions that challenged people to think of alternative approaches or results?

6. Generalizing

- Were there open-ended questions that helped participants think critically about generalizable conclusions?
- Were participants' responses summarized and written on flipchart?

7. Applying

- Did the questions encourage participants to identify what they will do better/differently as a result of what they have learned?

8. Closure

- Was there a summary at the end and a transition to the next session if appropriate?

B. Audio-Visual Materials

- Was the choice of materials appropriate to the design?
- Were flipcharts or transparencies visible? Readable?

C. Style Considerations

1. Voice/Behavior

- Was the voice level loud enough?
- Was the speech pattern too fast? Too slow? Varied in rhythm and inflection?
- Was eye contact sufficient?

2. Interventions

- How were questions handled?
- Was paraphrasing used?
- Was summarizing used?

3. Co-Facilitation

- How were transitions between trainers handled?

Notes

Notes

Notes

How to Work with Overhead Transparencies

An overhead projector is an educational aid by which your audience will learn more and retain more since they are receiving information both verbally and visually. It is a communication system that is simple, flexible and convenient.

The purpose for using overhead transparencies is to project graphic materials that are otherwise too small to be effective. Transparencies allow you to present sequential information and build upon an idea. In addition, you can keep the light level in the room at a moderately high level so you can maintain contact with your audience.

HOW TO HANDLE TECHNICAL PROBLEMS

Your Position at the Projector

You operate an overhead projector in the front of the room as you stand beside it facing the audience. The projection screen is behind you.

Make certain that the neck and lens of the machine do not interfere with the audience's view of the projected material and that in giving the presentation you yourself do not obstruct their view.

Adjusting the Angle of Light

When you turn on the projector, the reflected light may strike the screen creating an effect that is narrow at the bottom and wide at the top.

To correct the problem, raise the lens higher. This will eliminate the angle from lens to screen. If you are using a roll screen, tying back the lower level will also correct the angle.

Place the transparency on the glass table-like surface of the projector where you can refer to details which are projected on the screen. Make sure it is properly positioned so no light leaks or awkward angle of the image occurs on the screen. <u>Progressive disclosure of the material on the transparency can be accomplished by sliding a cover sheet of paper away from topics or areas of the transparency to be shown</u>.

If you decide to use a pointer, use a thin device such as a toothpick or paperclip. Any larger object (pencil, pen) will project too great a magnification. Also, the quivering of your hand will show on the screen. Don't hold it over the platform.

Changing Transparencies

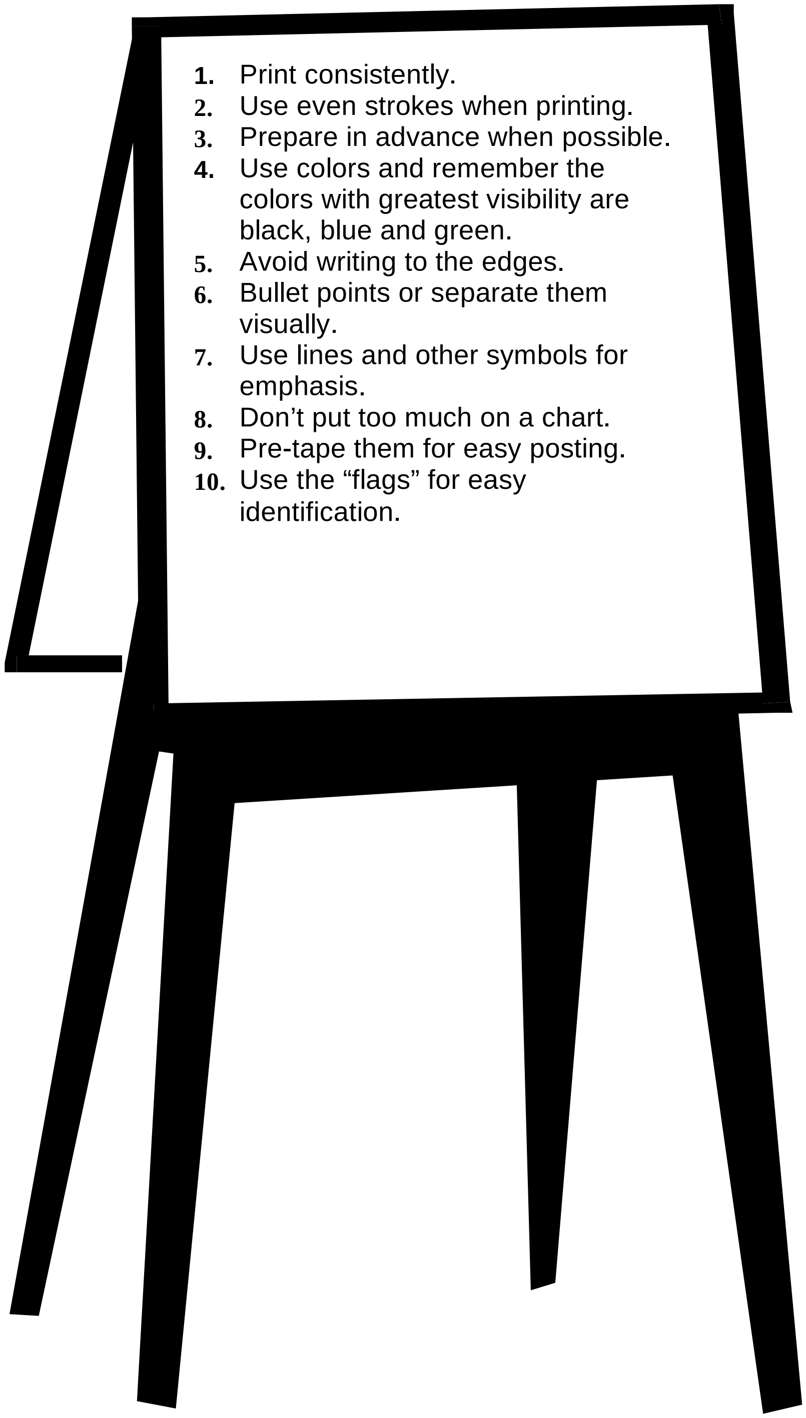
You can annoy and lose the attention of your audience by allowing a blast of hot white light to startle them between transparencies.

To avoid this problem, maneuver the next transparency into position as you remove the preceding one in a quick smooth simultaneous transfer.

Another method is to merely turn off the light, remove the old transparency and position the next one, then turn on the light.

Remember to turn off the projector when you do not want the attention of the audience directed at the screen.

Tips for Making Flipcharts



Giving Tasks

Activities such as skill building, case studies, role-plays, simulations, and other types of problem solving constitute the core of the experiential learning cycle. They provide learners with opportunities to practice skills that they can use in the workplace. These activities also represent an important investment in time, money and energy both from and individual and organizational perspective. In order to get the best return from this investment, trainers have an obligation to plan learning activities with great care and rigor so that learners will gain maximum benefit from them.

An important part of the planning process is to give a set of instructions that will help learners easily and quickly understand how they are to carry out the activity; therefore, instructions need to be clear, concise and written. They should at the very least include: wording that is aligned with the objective; a description of the expected result; the steps to follow during the task; the time allotted; and guidelines for reporting out.

Wording. The wording needs to be to the point so learners can quickly absorb the instructions and begin the task. To select the wording of a task, the learning objective is an important reference. The wording of the objective can provide clues that will help formulate the task. In addition, the interactive presentation that accompanies the task will contain the elements of the theory or framework that forms the basis for the activity. When giving a task, it is important to use as few words as possible – be concise, clear and to the point.

Expected Result. A description of the result that learners are expected to produce. The result may be a product, either written or constructed, or a process, which is more likely to be verbal or physical.

Steps. A proposed sequence the learner can follow in preparing for and producing the result.

Timing. An allotment of time learners will have to complete the activity. It needs to be realistic, allowing enough time for learners to produce the result without feeling too rushed. Time allocation may be broken down into separate steps.

Report Out. Explanation of the plan for sharing the results with other learners. If it is a written product, the reporting out may involve a presentation by one of the group members using a flipchart, or it may involve simply posting charts around the room so that people can view them in gallery format. The report out may be verbal, in which case someone from each group needs to be ready to speak.

Preparation time. Learners usually need time for individual preparation, ranging from 3-10 minutes to read a case study to 30 -60 minutes to prepare a presentation. The preparation task is often displayed separately from the small group or other task that follows so that learners can concentrate and avoid being distracted with too much information about what will happen later.

Structuring small group work. When giving instructions to learners working in small groups, it is often useful to propose a process by which they can structure their work together. The process usually involves identifying a facilitator and a recorder. The job of the facilitator is to help the group focus on the task, to track the pace of its work, and to make sure everyone has an opportunity to participate in a balanced manner.

Observation guide. Instructions for one or more observers are often necessary for skill building tasks. These instructions are intended to help observers take notes about specific actions so that they can provide specific and descriptive feedback when the practice has ended.

Co-Training/Facilitation, Team Teaching... What Is It?[3]

Co-training is where two or more (usually two) trainers work together to design and conduct a training session; however, it is much more involved than taking turns. It is two trainers who are merging their skills, expertise and experience to design, plan, and conduct a training session or program jointly, allowing the synergistic effect to contribute to a better product than either would have done alone.

The two trainers work collaboratively to design the training session, combining the thoughts of both to determine what they want this session to accomplish and what would be the best methods to use. Once the design is prepared, the trainers then plan who takes the lead for delivering which parts of the session.

Taking lead responsibility means that one trainer has responsibility for leading the group through that particular part of the session. While one trainer carries lead responsibility, the co-trainer supports the lead trainer in many of the following ways:

- adding relevant points to augment discussion;
- stepping in to clarify points;
- asking probing questions the lead trainer might have overlooked;
- monitoring small group tasks;
- writing participant contributions on flipchart;
- helping respond to participant needs or requests;
- listening for points to which he/she can refer later when in lead trainer role;
- preparing for a smooth transition from one trainer to the next.

Typically, lead responsibility would shift from trainer to trainer during the course of a workshop. This is a good way to establish with the group the co-equal status of the two trainers.

When two trainers work well together, the interchange of roles and the timing and pacing of their interventions happens in a way that is fluid and almost unnoticed by participants.

A Co-Trainers Guide

Preparing

[3] Copyright 1995. All rights reserved. Adapted from McCaffery, J. and Gormley, W. "Guide to Co-Training". 1988: Training Resources Group. Alexandria, VA

1. Discuss and share any knowledge or expectations you have about the participant group.

2. Discuss who will take lead responsibility for delivering particular pieces of the workshop.

3. Decide where the co-trainer will be when the lead trainer is up-front.

4. Agree on ways you can intervene if time is getting tight.

5. Decide how you will handle the following as a team...

(a) over-talkative participants

(b) late-comers

(c) times when one trainer misses an instruction or makes a design error

(d) silent participant

(e) "housekeeping" problems

(f) co-trainer interventions (i.e., when lead trainer is up front and co-trainer intervenes)

(g) design problems that crop up during a session

(h) disagreements between trainers in front of group

(I) the amount of time you expect to spend each evening preparing for the next day.

6. Identify any specific items around which you would like feedback from your co-trainer

Workshop Debriefing

1. Conduct a debriefing session.

2. Discuss the degree to which you thought the goals were achieved.

3. Identify and summarize any overall training design problems you saw during the workshop. Note what you might do differently the next time.

4. Ask for feedback (What did I do today that was effective? What did I do today that was ineffective?) Share any overall feedback you have for each other.

5. Share how you thought you worked as a co-training team during the workshop. Add into this discussion anything you would continue doing the same the next time you work together. What would you do differently?

6. Discuss some of your significant personal and professional learnings that came out of this workshop.

Reflections on Round One of Practice

What did you like about your facilitation during the practice session?

What do you think you could have done differently?

What have you learned from your experience of:

planning for your session?

delivering your session?

co-training with your colleague?

Notes

Notes

Notes

Preparation for Practice Round Two

1. Choose the section of a module that you would like to train.

2. Go through and make any adjustments based on timing. Make sure you plan to give your 'participants' some context for where you will be beginning in the design so we can jump right in.

3. Divide the module equally between you two.

4. Prepare your visuals - flipcharts, transparencies

5. Do a brief dry run of your module

6. Make decisions about where each co-trainer will be standing when in the lead, sitting when not in the lead, when to be available to help write on flipchart, distribute handouts.

Reflections on Round Two of Practice

What improvements do you recognize in your second round of practice?

What areas continue to challenge you?

What new insights did you gain from this round of practice?

Loose Ends and Q& A

Consider what you hoped to learn during this week, and all of the content we have covered thus far. Shortly, you will have the opportunity to pose any questions you wish to the trainers and the group for further discussion and input.

What questions remain unanswered for you? What do you want to hear or learn more about before we conclude this training?

Planning for Application

In order to prepare for using what you have learned, we want you to do some careful thinking about when and how you will apply new skills and knowledge gained through this training.

1) Review your workbook, in particular the reflection pages.

2) Complete the worksheet below, and consider what you will do, when you will do it, the obstacles you might face along the way and what actions you can take to effectively remove those obstacles or get the support you need.

The next opportunity I will have to try out my new learning is....

____

____

____

____

____

____

The actions I will take in this situation to try out new skills and knowledge are:

Skills/Knowledge I will use:	Actions I will take:
____________________	____________________
____________________	____________________
____________________	____________________
____________________	____________________

I will know I have been successful if:

The obstacles I might encounter, and the actions I can take to overcome them are...

Obstacles	Actions I will take

The help and/or feedback I want from others is....

Notes

Notes

Notes

Program Starters

Introduction

> "Why am I here? Will this training program be of any use to me? What about the work that I'm not getting done while I'm here? What is it we're going to learn anyway? What kinds of activities do the trainers have in mind for us? Who are the other people in this program? How will I interact with them? Why are they here? How similar are their expectations from mine? How will the schedule affect my personal life - family, friends or social activities? What about meals, breaks, my overall physical comfort while I'm here?"

These questions are often on the minds of participants as they sit in a classroom at the beginning of a training program. As trainers, we need to anticipate these questions and plan activities that will help people feel comfortable and begin the process of responding to their needs and expectations.

A simple round of introductions is usually not enough. It is also too early to plunge immediately into the training program objectives and schedule because participants are not quite ready. Many of them are still thinking of issues back at work or they are so busy thinking about some of the above questions that they are not yet concentrating on the training program.

Trainers can ask participants directly what their expectations are, discuss them and tie them to the objectives and schedule. But before getting into such a serious discussion, participants need a program starter, a light and energizing activity that helps orient them to the main themes of the program and gets them acquainted with the other participants. A program starter is an interactive activity that can last from 20 to 40 minutes, depending on the size of the group and on the length of the training program that it introduces.

Desired Results

The time commitment required by a program starter is a worthwhile investment. It can lead to several important results, including:

- Helping participants make the transition from their daily routine and behaviors into a positive learning environment;
- Establishing a climate of trust, both among participants and between them and the trainer(s);
- Revealing some of the resources existing within the group;
- Giving trainers some other data about participants;
- Helping people overcome feelings of loneliness or shyness;

- contributing to a sense of group cohesion and identity;
- reinforcing the role of the trainer as a facilitator of the learning process rather than as a more formal expert lecturer;
- reducing the trainer's anxiety level -- trainers, like participants, benefit from program starters.

Effective Program Starters

Program starters are intended to set a positive learning climate. Trainers should avoid activities that are: competitive where participants might "fail"; trivial and unrelated to the subject of the program; or so closely related to the subject matter that they lead to long and heavy discussions. The challenge for trainers is to choose an activity that is both appropriate and enjoyable. The most effective program starters:

- get everyone involved in an activity, preferably one in which people move around the room and talk with others;
- provide an opportunity to get to know the other participants backgrounds, behaviors, and expectations;
- begin the process of reflecting upon and discussing the themes of the training program;
- reinforce the participatory methods to be used in the program;
- provide a chance to have fun while learning.

Several resources exist for program starter activities in publications listed in catalogs including HRD Press and Jossey-Bass/Pfeiffer. In selecting the appropriate activity, trainers need to think about the profile of the participants so that it is well-suited to their backgrounds. One of the most important considerations is to link the activity with the main themes of the training program. The difficulty lies in finding something that will get people to discuss these themes without belaboring them at this point in the program. Therefore, what works best is something that elicits quick responses by drawing out some analogies through symbols or brief statements.

Trainers from Training Resources Group, Inc. (TRG) have used a wide variety of program starters over the past 15 years, both in the U.S. and overseas. The "Symbols", "Statements" and the "Role Drawing" activities are examples of the most successful and adaptable activities that TRG has used in hundreds of training programs.

Symbols

This activity usually takes between 20 and 30 minutes. Trainers post four to seven symbols around the room (depending on the number of participants), spelled out or drawn onto sheets of flipchart paper. These symbols may be animals, kitchen utensils, tools, musical instruments, geometric shapes, or food items. The trainer gives instructions to choose the symbol that best represents how participants view the role of a profile or a function that is the focus of the training (a trainer, a supervisor, a manager, a leader), or how they see a particular team or organization. The participants stand next to the symbol of their choice, then reintroduce themselves to the others standing with them (if they don't know each other) and discuss the reasons for their selection. While all the groups are still standing next to their chosen symbol, the trainer asks for one person from each symbol group to give a quick report that summarizes the group's discussion.

It usually works best to do a second round with a different set of symbols and a different question, such as choosing the symbol that best represents how they feel as a participant in the training program, or how they would like to feel at the end of the program. A second round promotes interaction among more participants and provides an opportunity to reflect on some personal feelings. At the end of these rounds, the trainer may highlight some of the themes that are connected to the group reports and tie them to the course objectives.

Statements

Trainers can substitute quotes, slogans, or statements for the symbols either in both rounds or in the second round, as appropriate. An example of a program starter used by a TRG trainer in a leadership course was to put each of the seven habits of highly effective people (from Stephen Covey's The 7 Habits of Highly Effective People) around the room and ask participants to choose, in the first round, the one they feel they do well, and in the second round to choose the one they need to work on the most.

Role Drawing

This activity takes from 45 minutes to an hour. Therefore, it is more appropriate for longer training programs lasting a week or more. It is intended to help people think about roles or to begin the process of visioning.

Trainers ask participants to think about the role of a [trainer, a manager, or some other occupation] or of their vision of [a successful team, organization, or strategy] and instruct participants, working in groups of four to six people, to discuss how they see that role. Then the trainers ask each group to draw a picture that best represents how they see that role or that vision. They may not use words or acronyms so that they rely on concepts derived from drawings and not words. The trainers provide flipchart paper to each group and a set of multicolored markers. They give 20 minutes for the task. The trainers ask that all group members participate and encourage each group to begin drawing on the flipchart as soon as possible to make sure everyone sees and provides input.

For the report out to the entire group, the trainers post all of the drawings at the front of the room, their contents concealed so that they can be unveiled one at a time. When unveiling each drawing, the trainers ask the group that created it to remain silent while the other groups describe what they see in the picture. The trainers then turns to the group that created the drawing and asks them what they intended to portray, noting the themes at the bottom of the drawing or on a separate sheet of paper

.

The trainers post the drawings around the room so that they are visible and can be referred to during the entire training program. In the final closing activity, the trainers may ask the groups to return to their original drawing and make changes to them based on what they learned during the week.

Conclusion

Program starters enable participants in a training program to make a transition from their everyday activities to their new learning environment. They get to know the other participants, reduce their anxiety level about both the content and the process of the training program. Trainers need to design a program starter that is appropriate to the themes of the program and to the participants' backgrounds. The most effective program starters are those that allow participants to begin to reflect on the course themes and to enjoy themselves without getting into an in-depth discussion. Used appropriately, program starters set the tone for a positive, thoughtful and participatory learning process that should last throughout the entire training program.

Skill Building Activities

By Graeme P. Frelick

Skill building activities provide learners with opportunities to practice reinforcing or improving their performance by simulating work and life situations safely and with focus. They can practice safely because learners can make mistakes without fearing consequences either to themselves or to others. The focus comes from practicing and receiving feedback on specific skills in a structured environment that maximizes learning opportunities.

Trainers structure these activities by selecting a set of skills that are aligned with learning objectives. They ask learners to identify real-life situations in order to make the practice as realistic and useful as possible. Depending on the situation, this practice may involve a range of interpersonal or physical skills such as: conducting a conversation or a presentation to work on communication or training skills; performing medical procedures on a patient; operating machinery or tools; or playing a sport.

Skill building activities are most useful when guided by a structure that includes a set of specific behaviors or procedures such as a series of steps or a framework. This structure makes it possible to assess progress in using a set of skills. It also helps learners prepare and makes the feedback very specific during or after practice. In order for this feedback to be timely and useful, learners benefit from having observers who can take notes and provide feedback based on the structure identified for the skill they are practicing.

Trainers prepare specific instructions both for the person who is practicing and for the observer(s). The observer(s) may be just one person who is either a trainer or another participant, or more than one participant. The choice and number of observers depend on several factors: how many participants are in the training program; how many people need to practice the skills; and how safe it feels for the one practicing. It may feel safer with only one observer, or it may feel safe with a group of observers depending on the situation.

Preparation and Practice Steps

These suggestions to trainers for managing the preparation and practice process assume a situation where learners are working on interpersonal skills.

Preparation for the One Practicing the Skills

- Give the learners individual time to prepare supported by a sheet containing specific instructions and with enough room to write down what they plan to do and how.

- Verify that the learners understand the instructions and be available: to answer questions either on a group-wide or individual basis; to provide examples that will help learners prepare more quickly or confidently; or to ask for examples from other participants in order to assist those who may be stuck.

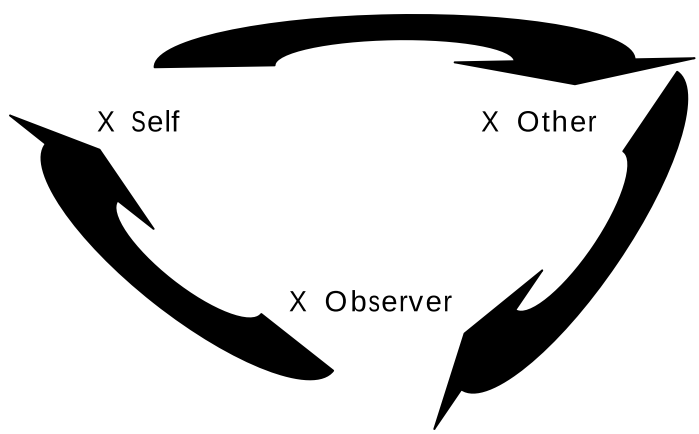
- Check in at the end of the individual preparation period to make sure that everyone is ready.
- Note: This preparation activity may be done in pairs or trios as long as the same people will not be the ones practicing that particular scenario.
- <u>Setting up the Practice Activity</u>
- In a situation where trainers want to give all learners an opportunity to practice, it is advisable to have people working in concurrent trios. Each person takes turns in the role of "self" – initiating the prepared conversation, "other" – in the role of the person who is the object of the practice, and being the observer. They work for three rounds as follows:

Round One

X Self X Other

X Observer

Round Two -- "Self", "Other" and Observer rotate



Round Three – One final rotation

Example of typical instructions

Trio practice task. Three Rounds – 15 minutes per round:

Round One

1) *The person playing "self" briefs the "other" and the observer about the context of the situation and typical behaviors of the real person whom the "other" is playing. The briefing may include specific areas where the person practicing would appreciate feedback – skills that have been difficult to master, or new skills not yet tried out. (5 minutes)*

2) *Begin practice. Conduct the conversation. The "other" is careful to play the role in a balanced and realistic manner. The observer writes down feedback and monitors time to make sure conversation stays within the allotted time (trainer may decide to monitor instead). If you get stuck or make a false start, "rewind the tape" and start over. (5-10 minutes)*

3) *Feedback. The observer shares notes about what worked well and what could be improved while being specific, descriptive, non-judgmental, and focusing on the impact of practiced skills. (5 minutes)*

Round Two

4) *Rotate and begin the process again: briefing, practice, and feedback.*
(15 minutes)

Round Three

5) *Rotate and begin the process again: briefing, practice, and feedback.*
(15 minutes)

Total time: 45 minutes

The Role of the trainer in managing skill building practice

The trainer has an active role throughout the practice steps, setting up the task instructions, monitoring progress, and conducting a processing discussion at the end.

Setting up task instructions

- Write instructions on flipchart supplemented by handouts if necessary (handouts are especially helpful if participants are spread out in different rooms or in a very large room).
- Verify that instructions are fully understood by checking with the entire group first, then checking in on individuals as they prepare.

Monitoring progress

Try to sit in on each group at least once in order to:

- Make sure the group is on track, with a clear understanding of the task and moving forward productively.
- Reinforce the observer's role, adding comments to what observer says during the feedback portion, helping the observer be descriptive, non-judgmental and focusing on impact.
- Encourage participants to find their own solutions unobtrusively by drawing them out with questions to enrich their own feedback to one another. Avoid "taking over" the group by talking too much or giving too many answers.

Processing Discussion

Assemble the entire group when practice has ended, and optionally in between one of the rounds. Ask the observers for examples where using a skill worked well and where they experienced difficulties. Ask different groups how they saw a particular skill being practiced, getting as many different options as appropriate and relating them to the skill model they were working on. Ask how it felt to use these skills, both for the person playing "self" and the person at the receiving end playing the "other".

Traps to watch out for

Skill practice activities are extremely valuable when they are well managed. There are some potential traps that can reduce their value:

1) The practice activity ends after 1-2 minutes thereby reducing the opportunity to experience the challenges and opportunities associated with using the skills. The

observer is left with very little data for feedback and the person practicing misses out on the experience of using the skill and getting helpful feedback. This scenario may be due to:

- Inadequate preparation – the learner did not fully think through the scenario at hand.
- The situation selected by the learner was too simple, closed-ended, or with an obvious solution.
- The person playing "other" was not sufficiently briefed, or could not otherwise get into the role enough to be realistic.
- The observer interfered with the practice by ending it prematurely or making comments that interrupted the practice.
- The person practicing got stuck or made a false start and no one thought to "rewind the tape" and start over.

2) The practice session for one or more persons goes over the allotted time, reducing or eliminating the time others will have to practice, or slowing down the session for the other trios:

- The observer does not stop the action at the end of the allotted time and practice goes on.
- The feedback session goes over time.
- Members of the trio discuss an issue at length, either at the briefing stage, which means they may never get started with practice, or at some point during feedback, cutting into practice time.
- The trainer gets involved and interferes with the practice. This scenario can occur when participants ask the trainer for advice or for help and follow up with a dozen other questions not directly related to the activity.

Case Studies

Case studies can be used to support these Learning Domains:

- Analysis/problem solving skills.
- Thinking through and discussing "how" to do something, planning/strategizing.
- Identifying factors/issues in a problem, problem identification.
- "Reality-testing" a model or approach.
- Providing an initial step in preparation for trying out a conversation, or other experiential methods.

Characteristics of Training Sessions Which Effectively Use Case Studies:

- The case study relates to session objectives.
- The outcome of the case is not predetermined, there is more than one "right" answer.
- There is not too much extraneous data in the case.
- The case is as realistic and authentic as possible. It is relevant and the participants can relate to it as a tough problem to solve.
- The case is written so that it leads to a point of action "what would you do?" "What do you see here?"
- The session gives everyone a chance to participate.

Suggestions for Writing Case Studies

A case study is a narrative account of a series of events or situations around a specific problem or problems. There are a wide variety of problems that could be part of a case study, relationship difficulties between people, loss or lack of funds, unclear roles between people who work together, bureaucratic system inadequacies, etc.

Writing a clear case study starts with making sure that the narrative is well aligned with the session objective. The objective would be analytical in nature: identifying preferred options for solving a problem, or listing strengths and weaknesses of characters in the case. One way to organize your thoughts as you write the narrative for your case is, quite simply, beginning, middle, and end.

1. Beginning

- Where is the situation occurring and in what context? (This sets up the framework for the problem(s) the case study will be addressing.)
- Who are the major characters and what is their relationship to each other?
- What is the situation of these characters at the beginning of the case, what issues do they face, and what are their thoughts and feelings about these issues?

2. Middle

- What problem situation(s) are developing?
- What events and factors are contributing to the problem(s)?
- Where are the major characters and what are they doing?
- Are there minor characters who are now entering the picture? Who are they and what connection do they have with the situation(s)?
- What is happening to the relationships between the characters?
- What systematic problems are being addressed, and how are they being developed?

3. End

- What is the status of the problem(s) now?
- What are the major/minor characters doing and what are their thoughts and feelings?
- What has happened to the relationships between the major characters?
- How can the ending occur in such a way as to allow for differing interpretations?

The Study of the Case

The study portion of this activity usually consists of questions to help the reader understand the case, followed by other questions to guide the analysis of the case. The initial question(s) will help focus the reader's attention on the key points in the case usually for an individual reading activity. The analysis questions form the basis for a small group discussion that may generate a group product. It also helps the group prepare for the larger group report out portion of the session.

Steps in Delivering a Case Study

After beginning the session with climate setting questions, presenting session objectives and possibly making an interactive presentation on the topic at hand, the following steps will help guide learners through the case study process:

1. Make a transition from the previous activity and explain why you plan to use a case study to achieve the session objective.
2. Distribute case to participants. Provide an opportunity to read the case. You may choose to give task instructions at this point.
3. Briefly overview the case, give participants an opportunity to ask questions. Clarify facts of the case.
4. You may give task instructions at this point, or repeat them if you gave them earlier.
5. Divide learners into small groups to work on the task.
6. Monitor small group work.
7. Manage group report-outs and process the discussion using facilitation skills.

At this point the session may move on to another activity. If it is ending, then you will have the generalizing and application steps followed by closure.

Demonstration Case Study

Objective: Identify steps that can be used to help solve supervisory problems.

Case Narrative

For several years Carol had been a very successful writer for a large organization. She was recently promoted to division manager and placed in charge of a staff of five writers.

Soon after the promotion, her division was awarded a very lucrative and highly visible contract by company X. The account was an exciting professional challenge, and one which had been awarded to the division based on the work Carol had previously done for company x projects as a writer.

The staff in Carol's division: 1) Fran, excellent writer, dependable, reliable, due to go on maternity leave in one week; 2) Judy, new trainee, eager, learns quickly, but still unproven; 3) Steve, had been contending for the manager position, excellent writer, lately has been uncooperative, intentionally missing deadlines, submitting incomplete outlines and taking a good deal of personal leave; and 4) two other writers, competent and dependable, working to capacity.

Company X calls and advances the deadline for a preliminary draft by two weeks. This deadline falls on the same day as the completed budget is due in the director's office. This budget is crucial to division planning for the coming year.

Carol goes to her boss and presents her problem. "I'm feeling a lot of pressure. Company X has just called and asked me to advance their deadline by two weeks. That places it on the same day as the budget is due. I just don't see how I can get both done. You know that Fran is going to be leaving, and Steve is being very uncooperative. Judy tries hard, but I'm afraid to give her anything important to do since I haven't seen her work under pressure. What can I do?

Her boss listens politely, offers a suggestion or two, and then quietly says: "Look, I know it won't be easy; figure out some way to handle it. I don't care how you do it, but I want both jobs done. This account is crucial. We've been waiting to get it for several months, and we can't blow it now. We also need the budget and it sure won't look good if you are late. Submitting a late budget is no way to build a reputation as a manager who can get things done. We've already put off the planning long enough. Don't even mention overtime. I just hired you a new writer. You are just going to have to make it happen. We can't afford delays.

Case Study Questions

1. Read the case individually. Identify all facets of the supervisory problem.

2. Discuss the facets of the problem in your small group. Choose an important one the group will work on.

3. Brainstorm - Generate as many different alternative solutions as possible. Be non-judgmental.

4. Determine pluses/minuses of each solution

5. Judge - choose what the group feels is the best solution.

Have one person be ready to make an oral report out of the solution selected by your group.

You have 30 minutes.

Role Plays

Role plays can be used to support Learning Domains related to:

- Specific human interaction and communication skills, e.g. delegation, interviewing, conflict resolution.
- Skills related to planning and developing strategies and a greater appreciation for the range of choices which might be available in a given situation.
- Skills in analyzing interaction and especially the impact of one person's behavior on another person.
- Individual perspective on what works and what doesn't work based on practicing new behavior in a simulated "real situation."
- **Characteristics of Training Sessions Which Effectively Use Role Plays**
- The objective is one that matches with what a role play can do. The situation posed in the role play provides the opportunity for session objectives to be achieved.
- The session is conducted so that both observers and "players" have an opportunity to learn.
- The issues highlighted in the role play have an obvious connection to the participants' real world. Participants should see the role play as plausible, real and compelling.
- Observers know specifically what to look for as they observe the role play.
- Steps are taken to help the role players feel comfortable.
- The role play itself is not too complex. It's easy to understand. It doesn't leave a lot of questions unanswered, and at the same time, it doesn't tell too much.
- The end of the role play is not scripted, it is open-ended. It incorporates a dilemma or struggle or conflict. There is some internal tension, something needs to be done, something needs to be dealt with. At the same time, the conversation is not impossible.

Suggestions For Writing Role Plays

Role plays contain narrative accounts of a series of events or situations either related to a problem or to new or different approaches learners can use. Some of the problems or approaches that could be part of a role play are: relationship difficulties between people, unclear roles between people who work together, team issues, convincing someone about a new idea or approach, etc.

A role play will often divide the narrative account into two or more parts, one for each character involved in the role play. The core section of the narrative should be similar for all character descriptions. What changes from one character to the next is the perspective of how that person sees the situation, so that the role player can identify with the character. The challenge for the writer is to achieve balance in the description of each character. This balance is made more difficult when the writer sees the situation from a particular angle; as a result the description of one of the characters may be more complete than the other or it may contain biases that will cause problems for the role players.

It may be possible to place all of this information in a single text that all training participants read, instead of separate texts. In this case each player's role still needs to be distinctly spelled out, which is some cases may make the situation a bit longer to read.

A key to the success of a role play is to have a clear learning objective. The objective should clearly state what the participants will be able to do by the end of the session. The objective could be analytical in nature: identifying preferred options for solving a problem, or listing strengths and weaknesses of characters in the case. The objective may be aimed at building skills, in particular different types of communication skills.

Writing a clear and concise role play starts with making sure that the narrative is well aligned with the session objective. Then, one way to organize your thoughts as you write your role play as with a case study narrative with a beginning, middle, and end.

Steps in Delivering a Role Play

After beginning the session with climate setting questions, presenting session objectives and possibly other activities, the following steps will help guide learners through the role play process:

1. **Overview the situation.**

   Briefly describe the roles of each of the two people who are involved in the conversation.

2. **Distribute the role description and give participants time to plan.**

   Hand out the role for one of the "players" and give participants an opportunity to plan individually how they would approach the conversation.

3. **Ask for volunteers - unless everyone is doing the role play simultaneously**.

   Choose someone to play the "other" role and someone to try out the approach to the conversation which they have planned.

4. Give observers' task.

5. Coach players.

Make sure that the "other" person understands the key elements of the role and emphasizes the importance of acting realistically don't overdramatize, react positively to the other person's efforts.

6. Set the stage.

7. Carry out the role play.

8. Debrief observers.

9. Debrief "players".

10. Derole "players".

11. Briefly explore other possible actions.

At this point the session may move on to another activity. If it is ending, then you will have the generalizing and application steps followed by closure.

Role Play Demonstration

Objective: Use assertiveness and cooperative skills to manage conflict situations productively.*

Role description 1: Anita

You are Anita. Maria is a colleague whose office space is close to yours. Overall, she has a reputation for being a competent, hard worker who puts in long hours. You do not have frequent contact with her, but she seems pleasant enough and you greet each other from time to time.

However, there are a couple of problems which bother you. First, she has loud conversations with people in her office. Sometimes it is when she is on the phone, and at others it is when someone is visiting her. At least three or four times a week you hear her yell at people. It really disturbs your concentration, and you feel stressed when you have to listen to some of her unpleasant conversations. The second thing is that she smokes, and you are sensitive to smoke. Even though she stays in her office when she smokes, the smoke still gets out and it bothers you.

You have also heard others complain about both of these habits, yet no one has talked to her directly. They are afraid of her reactions and have decided not to confront her. You decide to talk with her.

Use only ***assertive skills*** in this conversation.

* This portion of the role play focuses on assertiveness skills. Another portion (not shown here) deals with cooperativeness skills.

Role description 2: Maria

You are Maria and one of your colleagues, Anita, has asked to talk with you. You do not have frequent contact with her, but she seems pleasant enough and you greet each other from time to time.

What she has to say surprises you. It seems she has a couple of problems with you. First, she says that you have loud conversations in your office, and that you even yell at people. You have some long distance calls when you have to speak up, so that seems quite normal. In other situations, you feel the only way you can get things done around here is to be assertive with people. That has worked well for you and you don't see a need to change your approach. The second thing is that you smoke, and she reports that she is sensitive to smoke. You have always tried to careful with your smoking, so you stay in your office. Surely it can't be that big a problem. You resent people telling you that you cannot smoke, after all you feel it is your right. However, you want to try and solve this conflict with Anita.

Small Group Work

Small group work can serve a variety of purposes:

- Building problem solving skills to deal with a particular issue or problem (case studies, critical incidents, etc.).
- Building planning skills to deal with ways to approach a particular issues or opportunity (strategy development, developing a work plan).
- Providing opportunities for participants to react to each other's approach, giving advice, feedback and constructive help.
- Providing opportunities for participants to share experiences, both problems and solutions that might be helpful.

Making Small Groups Work Effectively

1. Keep small groups to 3-6 people.

You may want to assign people to groups to ensure a certain mixture, allow them to self-select, or randomly mix the groups. Whatever criteria you use to mix the groups be sure to explain what was used.

2. Be very clear in giving task instructions to small groups.

Giving effective task instructions demands precision and thoughtfulness. Remember to be attentive to wording, to spell out the expected result(s), to identify the sequence of steps for producing the result, to provide enough time, and to explain the report out format.

3. Monitor the small groups unobtrusively.

Watch, without interfering, to be sure that participants have understood the task, they are not having problems, or they have not gotten hopelessly entangled in another conversation or war story.

4. Keep track of time.

Give the small groups periodic time checks and a five-minute warning before stopping their discussions.

5. Have a plan for how to manage the small group reports to the large group.

The following are typical small group reports:

a. Subgroup samples: Used when groups have been asked to compile the same kinds of list. "Let's hear a couple of qualities that each subgroup identified".

b. One complete report plus additions: Used when the subgroups have been given different assignments. "Group 1, tell us what your found or developed." After the report other groups are asked to add to that information.

c. Formal presentations: Most effective when the subgroups have been assigned different tasks or have been asked to take a slightly different approach to some aspect of the same task. Each group gives a full presentation of their discussion points.

d. Polling: Used when the end product is a single answer.

6. Use facilitation skills to manage the processing discussion during the small group task report out.

a. Asking questions
b. Paraphrasing
c. Summarizing
d. Encouraging