المدارس الاقليمية لتنظيم الحملات

CAMPAIGN SCHOOLS

NATIONAL DEMOCRATIC INSTITUTE

A Trainer's Guide:

How to Design and Deliver Training with Impact

Shannon O'Connell
AbdulSalam Medeni

A Trainer's Guide:
How to Design and Deliver Training with Impact

Shannon O'Connell
AbdulSalam Medeni

The National Democratic Institute (NDI) is a nonprofit, nonpartisan, nongovernmental organization that responds to the aspirations of people around the world to live in democratic societies that recognize and promote basic human rights.

Since its founding in 1983, NDI and its local partners have worked to support and strengthen democratic institutions and practices by strengthening political parties, civic organizations and parliaments, safeguarding elections, and promoting citizen participation, openness and accountability in government.

With staff members and volunteer political practitioners from more than 100 nations, NDI brings together individuals and groups to share ideas, knowledge, experiences and expertise. Partners receive broad exposure to best practices in international democratic development that can be adapted to the needs of their own countries. NDI's multinational approach reinforces the message that while there is no single democratic model, certain core principles are shared by all democracies.

The Institute's work upholds the principles enshrined in the Universal Declaration of Human Rights. It also promotes the development of institutionalized channels of communications among citizens, political institutions and elected officials, and strengthens their ability to improve the quality of life for all citizens.
For more information about NDI, please visit www.ndi.org.

This manual was funded by a grant from the United States Department of State. The opinions, findings and conclusions stated herein are those of the authors and do not necessarily reflect those of the United States Department of State.

This project is funded through the U.S. Department of State, Bureau of Near Eastern Affairs, Office of the Middle East Partnership Initiative (MEPI). MEPI is a unique program designed to engage directly with and invest in the peoples of the Middle East and North Africa (MENA). MEPI works to create vibrant partnerships with citizens to foster the development of pluralistic, participatory, and prosperous societies throughout the MENA region. To do this, MEPI partners with local, regional and international non-governmental organizations, the private sector, academic institutions, and governments. More information about MEPI can be found at: www.mepi.state.gov

Shannon O'Connell

Shannon O'Connell is a facilitator, trainer and consultant specializing in political party and organizational development, with a particular focus on women's political participation and leadership. Shannon has extensive experience in politics, having worked on more than two dozen electoral campaigns and as a policy and strategic advisor to elected officials and political party leaders in both government and opposition. She has worked in more than 15 countries with the National Democratic Institute and was Country Director for NDI's programs in the West Bank and Gaza from 2003-2005. Shannon resides in Northern Ireland with her husband and two children.

AbdulSalam Medeni (Salam M. Islam)

AbdulSalam Medeni is a civic activist, experienced in civil society program management with a particular focus on the evolution and development of civil society in post-conflict environments. Salam worked with NDI in Iraq, while also supporting other programs in the region, from 2005-2012. He is a published author (four books and over 700 articles), an international trainer and facilitator, has delivered lectures at several universities and previously hosted his own television and radio programs. Salam currently serves as advisor to the Deputy Prime Minister of the Kurdistan Regional Government on civil society and youth issues.

Table of Contents

Introduction and Statement of Purpose

Since opening its first office in the region in 1993, NDI has conducted thousands of trainings throughout MENA. In 2012, NDI launched a regional campaign schools program designed to provide political activists with enhanced skills to design and implement campaigns. From the pool of campaign school graduates, NDI invited a select group of activists to take part in training of trainers sessions to prepare them for sharing what they had learned during the campaign schools in their home countries. NDI developed two manuals, the *Campaign Skills Handbook* and the *Campaign Skills Trainer's Guide*, designed to supplement the campaign schools – to aid trainers in supporting the campaign schools curriculum and to guide political activists through the fundamentals of designing and implementing campaigns.

Recognizing the need to develop a basic guide to training, the lead trainers for the campaign schools, Shannon O'Connell and AbdulSalam Medeni, have come together to co-author this manual – a step-by-step guide to designing, preparing, conducting and evaluating a successful training program. *A Trainer's Guide: How to Design and Deliver Training with Impact* focuses solely on the basic principles that a trainer should follow in order to gain the best possible outcomes from a training he or she delivers. In addition to providing instruction and guidance, O'Connell and Medeni share their stories and lessons learned based on their experiences. These examples will aid readers in conceptualizing how and why these core training tactics are effective. The authors discuss how to anticipate and overcome common challenges, the importance of using a variety of training styles and how to develop methods to ensure that audiences are learning. This manual serves as a how-to guide for new trainers and as a refresher guide for veteran instructors within the NDI training community as well as for our training partners in the region.

A Trainer's Guide: How to Design and Deliver Training with Impact was developed with the support of the United States Department of State's Middle East Partnership Initiative (MEPI).

A note on language: This workbook is intended for use by politically active men and women. However, as masculine pronouns are usually used in Arabic to include both males and females, the text uses "he" except when certain terms that clearly refer to both genders, such as "trainer," "participant," etc.

Chapter One:
Teaching vs. Training

"Tell me and I forget. Teach me and I may remember.
Involve me and I learn."

Benjamin Franklin
Publisher, Statesman, Inventor, and one of the authors of the
US Declaration of Independence

What does it mean to be a trainer and to train? Is it not just another way of describing teaching? After all, we've all been to school in some shape or form. We've invested much of our youth, spent countless hours, and quite a few resources in various schools and learning institutions. Could "training" really be that different from the standard systems of instruction we know so well and with which we've interacted for so long?

In this chapter, Salam will address these questions through the lens of the education system in the Middle East. While his focus is the contrast between traditional teaching in the region versus contemporary approaches to training and facilitation, the key points made are universal and valuable for any trainer, regardless of his or her background.

Our parents criticize the education systems in Middle Eastern societies. They tell us, "When we were kids in school and the teacher was passing by, we would hide to avoid being seen by the teacher!"

In our traditional culture, the line between respect and fear is unclear. In order to respect a teacher, you must fear him. The elder, the leader – we must be obedient and not object or challenge them. I know several stories of students who tried to suggest to a teacher that there was another way to solve an equation in math or physics. They all received negative feedback.

In this chapter, we tackle the following ideas:

- **Section One: Traditional Teaching and the Impact on the Learning Process**
- **Section Two: Differences Between Teaching and Training**
- **Section Three: Core Elements of Training**
- **Section Four: What it Means to be a Facilitator of Knowledge**

Section One:
Teaching Styles and the Impact on the Learning Process

Many factors have influenced the learning systems and environments that we have established in our societies. History, religion, culture, and even politics have had an impact.

Historically in the Middle East and North Africa (MENA), mosques were the place to learn how to read and write. This was called kuttab. The word comes from the verb kataba, which means "wrote," and the noun kitab, which means "book". The person leading this process as the teacher was usually the Imam.

This meant that your teacher – the Imam – was also a source of knowledge about religion and life, and a leader in the community. This status made it very difficult to argue with him.

Additionally, few people would challenge their political or tribal leaders. As a result, a one-sided environment was created for the flow of information and knowledge – it came from those in leadership down to the people and rarely moved in the reverse direction. From this arrangement, the educational system and culture for learning were established.

This created a number of assumptions which became norms in learning environments:

- The teacher is the source of knowledge; he is sacred
- The audience doesn't have enough experience or knowledge
- The mind is like a set of drawers that the teacher will fill with information
- You cannot argue with the teacher; if you do then you are not being respectful and you are challenging his status and the learning process
- The flow of information and knowledge is one-way; students do not participate unless they have question
- The teacher is the center of the classroom – the teacher does all of the talking and the students do all of the listening

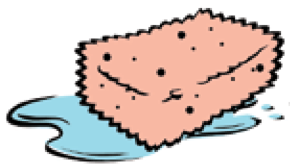
We made these assumptions, believed in them and established our education system and learning processes around them. Although these ideas lead to poorer outcomes for learners, they are still leading our systems of learning in the MENA region. Generations have been raised on these beliefs.

The traditional assumption has been that the teacher is sacred. His knowledge is like water in a jar being poured into the empty minds of students.

For the record, I would say there have been attempts by some scholars and intellectuals to correct these assumptions by trying other teaching methods. But these attempts have been limited and have not yet succeeded in creating new trends.

The core idea behind these assumptions is that people who have information, knowledge, and experience to share are sacred and are like a pitcher full of water, while the audience is a collection of empty cups. The teacher fills the cup. The student memorizes what has been taught and pours it back to the teacher verbatim in a test or exam. The problem is that this method will generate a learner with the following qualities:

- Passive or inactive (like a sponge)
- Accustomed to memorizing and repeating what the teacher says as opposed to understanding the concepts proposed
- Lacking creativity
- Lacking critical thinking or problem-solving skills
- Feeling as though learning is an awful process



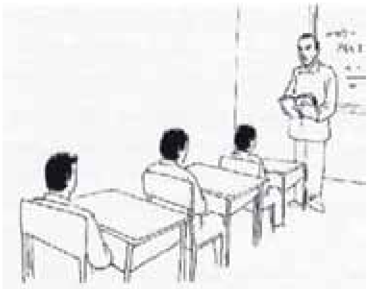
So while this approach may be easier for the instructor, it doesn't deliver the best possible outcomes for the learner and affects his or her ability to fully benefit from an opportunity to learn. Indeed, the negative impacts of a poor educational experience can be enduring and undermine people's openness to learning and the ability to be innovative and creative in the long-term.

Section Two: Differences Between Teaching and Training

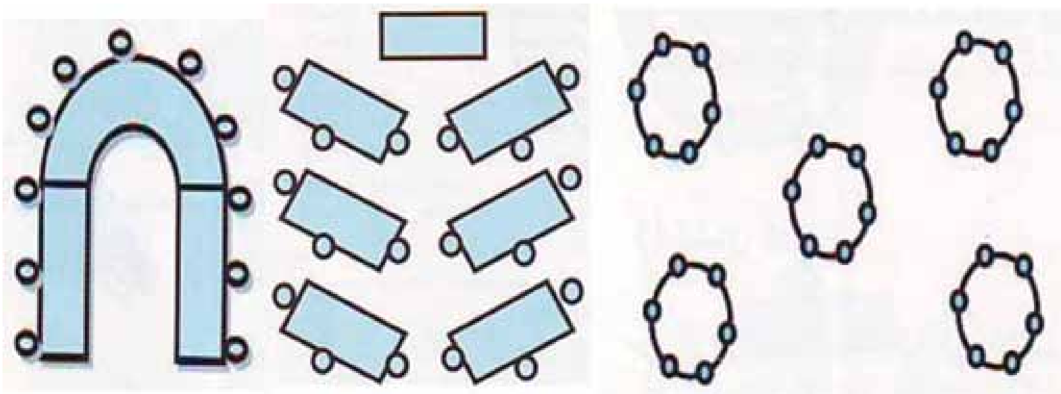
So what makes training different from teaching and why can it often deliver a better experience for learners? The chart below outlines some of the key contrasts between the two approaches.

	Approach to Communication	Assumptions about Knowledge	Aim or Purpose	Ways of Delivering Content	Physical Environment/ Room Layout
Traditional Teaching	One-way (from teacher to students)	The teacher is the only one who knows, and he knows more than the students He provides the correct answers	Transfer knowledge	Lecture Reading assignments	Row-by-row (see Picture 1)
Training	Two-way (between the trainer and participants) Learning is participatory; knowledge and experience are shared among all	Everyone in the room has the ability to contribute to the learning process The trainer guides the learning process but is not the only source of knowledge and experience in the room	Developing: 1. Knowledge 2. Skills 3. Attitude	Role Play Case Studies Simulations Discussions Problem-solving exercises Examples and activities	U-shape or any other layout that can facilitate conversation and participation (see Picture 2)

Traditional Learning Room Setup, Lecture Style (Picture 1)



Training Style Room Setup Options: U-shape, Fishbone, and Cabaret Styles (Picture 2)



Section Three:
Core Elements of Training

Formally defined, training might be described as:

The continued and organized process to gain and develop a defined set of skills in order to achieve a goal or accomplish a specific task

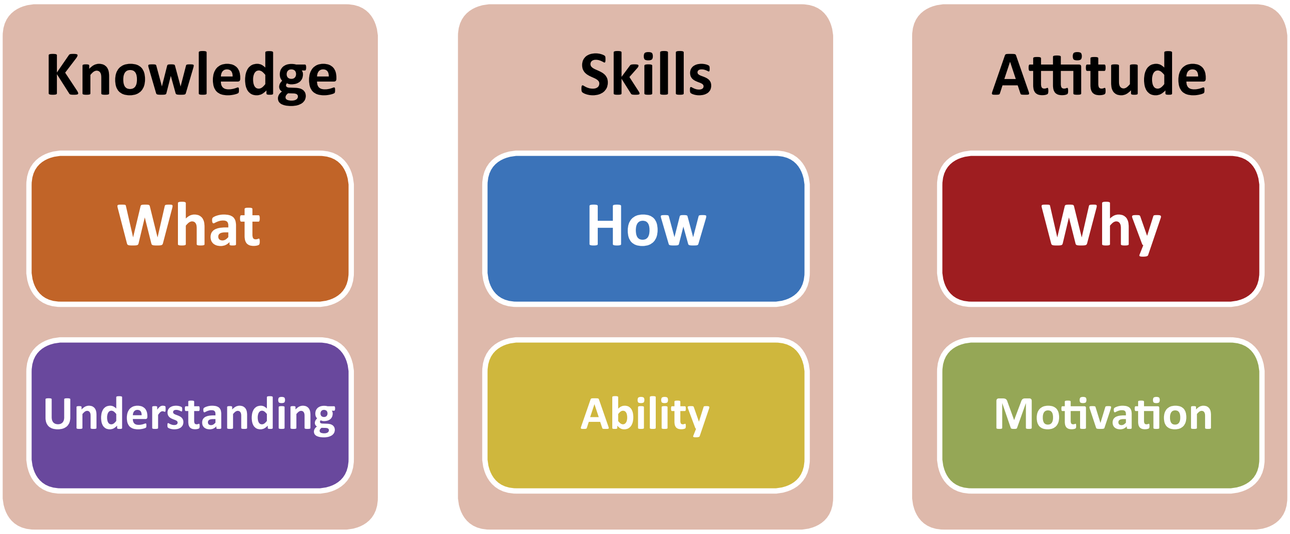
A planned human activity that aims to create change in an audience's knowledge, experience, skills, performance, and attitude

The organized development of knowledge, skills, and attitudes that a person needs to accomplish duties in an efficient manner[1]

Training, therefore, requires a different approach and a different skill set from the

1 See more resources: Dr. Akram Ridha – Instructional of Instructor Program, Cairo, Egypt, 2003; Abdulbari Ibrahim Durra, Human Performance Technology in Organizations, Arabic Organization for Administrational Development, Cairo; Ali Mohammad Rubai'a, Human Resources Management, Amman, DAR AL SAFA, 2003.

instructor. Rather than being the source of knowledge, the trainer is a facilitator of knowledge. What this means in practice is that the role of the trainer is not only to share information but to help learners develop stronger abilities by focusing on three areas:



Knowledge → All learning involves the acquisition of new knowledge to some degree and memory has a role to play in this. In training, however, the focus is on learning with understanding rather than sheer memorization. This means that learners have the opportunity to work with and explore new information in ways that allow them to understand its application and purposes in the real world, as well as how it is relevant to them as individuals.

Skills → Training involves not only the ability to think or talk about something but also developing a level of proficiency that allows the learner to actually practice or use that skill in his or her own life or work.

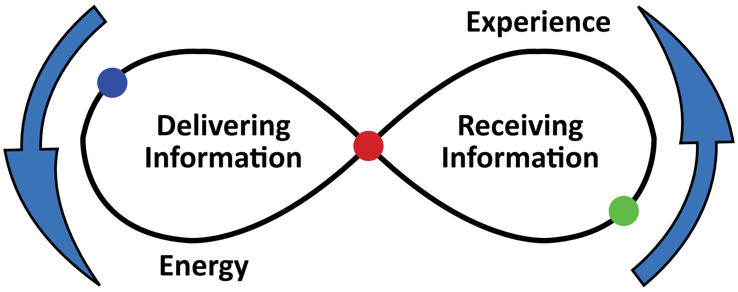
Attitude → Training recognizes that there is limited value in developing new competencies if learners are not motivated to actually use these abilities. For this reason, training also focuses on learners' attitudes and behaviors.

The shorthand for these three areas of focus is KSA (not to be confused with the Kingdom of Saudi Arabia!). These themes will be explored and expanded throughout this manual, using this abbreviation.

A trainer relies on a student-centered approach, which means that he or she is presenting the idea or activity, and then guides or facilitates the discussion and the learning process. The learning process is participatory and learners contribute to it by bringing in their own knowledge and experiences. In many ways, the participants in a training become their own teachers and the trainer serves as the "maestro" of the processes that allow this to happen.

Section Four:
What it Means to be a Facilitator of Knowledge

The figure below describes the manner in which energy, information, and experience flow between the trainer and participants during a learning experience:[2]



In this figure 8, energy, information, and experience are in constant flow on a lateral level among participants and the trainer. The trainer's job is to keep everything moving and make sure nothing gets stuck along the way. Salam was already doing this by intuition, but suddenly the science behind adult learning and what he was experiencing himself in the training room connected.

What is the science behind adult learning? There's quite a bit of it and the research that we have found most useful helps us understand the manner in which adults are likely to perceive and approach learning. Some of the main characteristics of adult learning to keep in mind are as follows:[3]

2 The source of the figure is explained in Chapter Five, Section One.
3 Adapted from Malcolm Knowles' adult learning principles as outlined in Principles of Adult Learning, Leib, S. (1991). Our own experience is added here as well.

1. Adults have experience

Adults have lived through various stages of life and accumulated experience. A good trainer will take this into consideration and continuously initiate exchanges that allow participants to draw on these experiences, examine them, and connect them to their learning. Trainers should not expect to interact with adults as passive receivers.

2. Adults are self-directed

As every romantic comedy movie teaches us, we cannot change anyone – even the ones we love! What we can do is provide the knowledge and methods that allow a person to choose change, but the actual choice is up to him or her. Trainers should provide the environment for participants to take initiative, feel responsible, and practice leadership in groups.

3. Adults like to practice

Adults want to practice and do what they are learning. It is not enough just to talk to them about work plans, negotiation, public speaking, etc. They need to design it and they need to practice it.

4. Adults are goal-oriented

Adults want to know how this session can improve their lives. How can this advance their professional prospects or develop a certain needed skill? How will this enrich their family relations, enhance their social life, raise their profile at work, or improve their income and ability to provide for their families?

5. Adults are practical

Adults want to know why it is important to learn this topic. Why is it essential to attend this course? They must see a reason for learning something. To be of value to the participant, learning must be applicable to their work or other area of their life that is important to them. Therefore, trainers must identify objectives for adult participants before the course begins. This means also that theories and concepts must be related to a setting familiar to participants. This need can be fulfilled by letting participants choose projects within the context of the training that reflect their own interests.

6. Adults are social

Adults want to connect with other people in the training room. They want to have conversations with each other, not just hear from the trainer. They like to laugh and enjoy each other's company; adult learning does not have to be dry and serious. Adults require respect to do their best.

What these principles mean in practice is that, in a learning setting, the role of the trainer really is to be a *facilitator of knowledge.*

Facilitator literally means "a person who makes things easier." A facilitator is a neutral third party who helps to increase the effectiveness of a group, a team or individual by helping them identify and adopt better ways of solving problems or achieving goals. Facilitators are enablers who help others achieve a higher level of understanding and performance.[4]

As a facilitator, you serve as a coordinator and organizer of groups, and ensure everyone is participating and staying on task. A facilitator never imposes a solution on the group. Facilitators clarify issues, focus discussions, bring out viewpoints, synthesize differences and look for underlying agreements.

Good facilitators can:

1. Be clear and to the point, and explain complex concepts in clear and accessible terms
2. "Read the room" and understand what is going on for participants without it being expressed explicitly
3. Maintain a challenging but comfortable pace for learning
4. Help participants build on each other's ideas
5. Demonstrate the ability to listen
6. Manage discussions to bring out key points
7. Use his or her own energy to keep participants motivated
8. Adapt language and training tools to the culture and experience of participants
9. Stimulate participants to think in-depth and look at existing concepts in a different way
10. Help participants see how the course content is connected to their personal and professional goals
11. Use feedback and evaluation for effective learning and constructive development
12. Use summaries and previews to keep the course content connected and relevant

4 HRC Youth College Program/Facilitation + Icebreaker Booklet.

A good trainer is like the maestro in an orchestra. Each participant is playing his or her own instrument with their own tune and the trainer should facilitate those tunes and instruments to come up with a beautiful symphony that all agree on, participate in, and from which they benefit.

Chapter One: Key Learning Points

1. Traditional approaches to learning that view the teacher as the source of all knowledge can lead to poorer outcomes for learners.
2. The role of the trainer is to be a facilitator of knowledge, rather than a lecturer.
3. Adults approach learning with a lifetime of experience and need to connect content with their personal goals and practical needs.

Chapter Two:
How Adults Learn

A trainer from North America was working with a program in Eastern Europe, delivering a workshop on voter contact. It was winter and they had to drive long distances between the towns in which they were working.

As they drove along unpaved roads, full of mud, rocks, ice and snow, they saw long lines of people waiting out in the freezing rain by the side of the road. There seemed to be a queue in every small village through which they travelled and the people looked weary and weather-beaten, as if they had been there a long time.

The driver, a local to the area, explained to the trainer that these people were waiting for the public bus that would take them to the nearest city, but there was no telling when or if the bus would show up.

The trainer was stunned at how bad this situation was. He turned to the driver and asked, "If you wanted to complain about how bad the public transportation service is in this area, where would you go? Who would you complain to?" He expected the driver to name some sort of customer service, ombudsman or public advocacy agency. Instead, the driver replied, "My mother."

One of the most important things for trainers to keep in mind is that as adults, we have developed predispositions. Predispositions are tendencies to see certain issues in a particular way. These are the result of the variety of experiences we have accumulated and personal opinions we have formed over our lifetime.

Predispositions influence how we see the world, how we engage with new information, and how we solve problems. In the story above, the trainer's life experience led him to believe that a government agency should be responsible for the poor performance of the public bus, and responsive to complaints. The driver's life experience led him to believe that no one in the government would actually care (but his mother might).

Being an effective trainer is about being able to embrace and celebrate the diversity of life experiences, predispositions and perspectives in any training room, and finding creative and engaging ways to turn subject matter and content into true learning experiences.

This chapter builds on the overview offered in chapter one and focuses on how to put into practice some of the key principles and techniques for helping to create this transformation. It is divided into four sections, based on some of the fundamental guidelines for supporting adult learning:

- **Section One: Adults Require Respect to do their Best**
- **Section Two: Build from the Familiar**
- **Section Three: Incorporate the Learning Cycle**
- **Section Four: Accommodate Different Learning Styles and Preference**s

Section One: Adults Require Respect to do their Best

Many newer trainers are concerned about whether or not they are going to have difficult participants – people who challenge them, or give them a hard time, or don't pay attention and distract others. They're worried about being able to "control" the room.

> All adults are capable of learning – they have the ability to engage with, absorb and adapt to new information. The question for trainers is not whether participants are ***able***, but whether they are ***willing***.
>
> Willingness is something a participant ***choses*** to give, and something that a trainer must often earn. The best way to do this is by creating a respectful and inviting training environment.

As a result, they often start a training session by being very strict: taking away cell phones that ring, publicly admonishing people for having side conversations, creating a punitive system for violations of the ground rules, and so on.

In fact, rather than a sternly disciplined environment, what adults really need to perform their best is respect.[5]

Adults are far less likely to see themselves as learners or students and, in a training room, may even perceive themselves as a peer or contemporary of the trainer. Remember, as adults they are bringing their lifetime of personal

5 Ibid., Leib, S.

personal experiences and ideas to the training. They are not just empty vessels there to be filled by the trainer's wisdom.

The role of the trainer is to help create a receptive state for learning – to help participants feel that they want to be there; that it is worth their time, energy, and hard work; that they will gain from the experience. This requires structure and rules, but not autocracy.

The best place to start to create a receptive state for learning is by establishing a foundation of respect.

Be generous with information

One of the simplest ways to communicate with adults that their time and interests are respected is to simply and consistently explain throughout the training why things are happening and when they will happen. This basic information helps adults put things in context, sets them at ease, and lets them know their participation is valued.

This type of communication can even begin in advance of the training. Sending out the agenda, trainer bios and photos, logistics briefing, and/or a brief program description demonstrates that you're making an effort to connect the training to the needs and interests of the participants.

Back up words about respect with non-verbal evidence

When Salam trains on public speaking, he talks about the importance of non-verbal communication matching the words that are spoken. (He spends some time on this in chapter six of this manual). To illustrate this point, he gives a short dialogue about how much he respects everyone in the room, but then slouches in his chair, put his feet up on the table – essentially in participants' faces – stares at his watch or takes out his phone.

Your body language, facial expressions, tone of voice and even your physical appearance should communicate respect for the participants. Ask yourself as you are going along, what kinds of messages am I sending out now?

Active listening plays a key role in demonstrating respect as well. Ensure participants feel they have been heard and when you have to end a discussion or someone's comments for time management reasons (or because someone has gone badly off-topic), do so without making it feel like an insult.

Use verbal and body language that shows that you're receptive to the ideas and suggestions of others, even if they are a direct challenge to the way you are doing things. Adults have opinions, and they are not always going to be the same as yours. It is better that they are heard and respected, rather than suppressed and allowed to fester. You can respectfully disagree or ask the group to collectively try to solve the problem or address the complaint.

In truth, the more you establish a training environment based on respect, the fewer disputes you are going to have with and among participants.

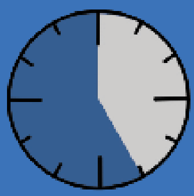
When appropriate, invite participants to play a role in defining how the training will run

Inviting participants to play a role in defining how the training will run does not mean they get to be involved in every decision. Many of these decisions need to stay solely with the trainer and program staff in order to maintain the learning objectives and outcomes and to protect the budget, and also to prevent the chaos and exhaustion of every choice being discussed by a large group.

However, there are certain aspects of a training session or workshop that have a bit more flexibility and adaptability and that can be more effective if constructed by the participants themselves. These include:

Expectations and Aspirations 	**Expectations** concern what the participants would like to get from the training, in terms of KSA, and what type of experience they hope to have. **Aspirations** are about what they want to achieve themselves and how this training will help them get there. • Adults need to know that the work that they're doing is tied to their personal and professional goals, and discussing expectations and aspirations helps to make those connections. • There's a good chance that participants haven't thought about what they want from the training before they walked into the room. People have busy lives and they may not have had time to put their mind to answering this question. This is especially true if they didn't choose to attend but were instructed to come by someone else.
Ground Rules 	**Ground rules** are the general guidelines the group will agree to follow during the sessions. • These typically include things like silencing mobile phones, starting and finishing on time, and respecting the opinions of others. • Rather than dictating a list (or worse, enforcing a set of your own rules that the participants don't know about until they unknowingly break one), allow the participants to construct the ground rules collectively, similarly to creating a community-learning contract.

Timing and length of sessions and breaks



Timing has to do with the length of the training day and when it begins and ends, as well as when breaks are taken and how long they last.

- Is there enough flexibility in the training content and the schedule to allow participants to have a say in how long each session lasts or when breaks will occur or when the training will close for the day?

- This does not mean you should sacrifice content to let people out an hour earlier to go and shop! It means that if there is sufficient flexibility, it can be nice to give participants a choice.

- You will need to set clear rules about how these decisions will be made as not everyone will have the same opinion and you don't want to spend a lot of time debating this. A simple "majority rules" system and a show of hands typically does the trick.

These don't need to be long conversations. With the exception of expectations and aspirations, these are largely administrative issues that shouldn't consume big chunks of training time. But having these discussions demonstrates that the trainer views those attending as active participants with opinions, needs, and a role to play in the training, rather than just passive recipients.

As adults, we are more eager to protect and more likely to benefit from experiences that we have helped to create. If participants feel they have had a role in how the workshop will be run, they are more likely to be committed to their own participation.

Demonstrate power with, rather than power over[6]

Within the context of the training room, trainers automatically take on the role of leader, at least in the initial stages. As such, trainers need to decide what type of leader they are going to be and how they will manage their relationship with participants and help them achieve their greatest potential.

6 The terms, "power with" and "power over" were coined by the pioneering management theorist, Mary Parker Follett.

Trainers who endeavor to create ***power with*** participants seek to create collaboration and strong inter-personal relationships with and among participants. They facilitate and manage both the learning and the dynamics in the training room, but do not try to dominate it, allowing participants to take and demonstrate leadership at appropriate times as well.

Trainers who try to practice ***power over*** seek to control the behavioral choices of participants. While a directive or prescriptive approach may be appropriate for (very) short times under (very) specific circumstances, if this is the dominant style it not only creates an unpleasant environment but it can shut down learning. When a trainer becomes overbearing or over-controlling, participants tend to shift their energy and attention towards simply enduring the experience rather than engaging in learning.

Section Two:
Build from the Familiar

As the story at the start of this chapter illustrates, adults walk into a training room with a lifetime of experience, opinions and dispositions. This can be uniquely true in the countries where NDI works. Many participants in NDI trainings – even younger people – will have seen regimes come and go; conflicts start, subside and reignite; and/or, large populations move to find safety or resources. Chances are the participants in an NDI training room have experienced a few events of historical significance, in addition to the everyday challenges that life itself brings.

This is important for trainers to keep in mind particularly because, like both the driver and the trainer in the story, when adults are asked to engage with new information or solve a new problem, they will seek to connect it to what they already know and understand.

As adults, we've not only racked up life experiences, but we've formed opinions and developed beliefs about how things do work and should work. When faced with new information, we will try to keep it in harmony with the values and understandings we have developed and tend to maintain a bias towards information that appears to confirm our beliefs.

From a human survival perspective, this makes a lot of sense. But it means that trainers need to begin their engagements with participants where they already are.

This does not require meta-analysis of demographic data, detailed biographies or exhaustive interviews with participants. It simply means that trainers should start with what is already likely to be familiar to participants and build from there. This is particularly important when the content or practice the trainer is trying to convey is significantly different from what the current social or political norm is.

Here are some examples on how to start with the familiar.

Need to introduce door-to-door canvassing?	• Talk about how people currently socialize with friends, family and neighbors and compare whether more personal forms of contact have more of an impact than less personal forms.
Need to help people understand the importance of strategy in an electoral campaign?	• Make connections to the fortunes of the local football (soccer) team. • You could also use a local, well-known fable or parable that people would recall from their childhood. (These frequently involve some form of moral challenge or a battle between "good" and "evil," with the hero or heroine forced to learn to make better, more thoughtful and strategic choices to be triumphant.)
Need to help people absorb the importance of understanding their target audiences when trying to engage in persuasive communication?	• Ask them to recall the last time they had an argument with their spouse, partner, or mother and analyze how effective their approach to communication was.

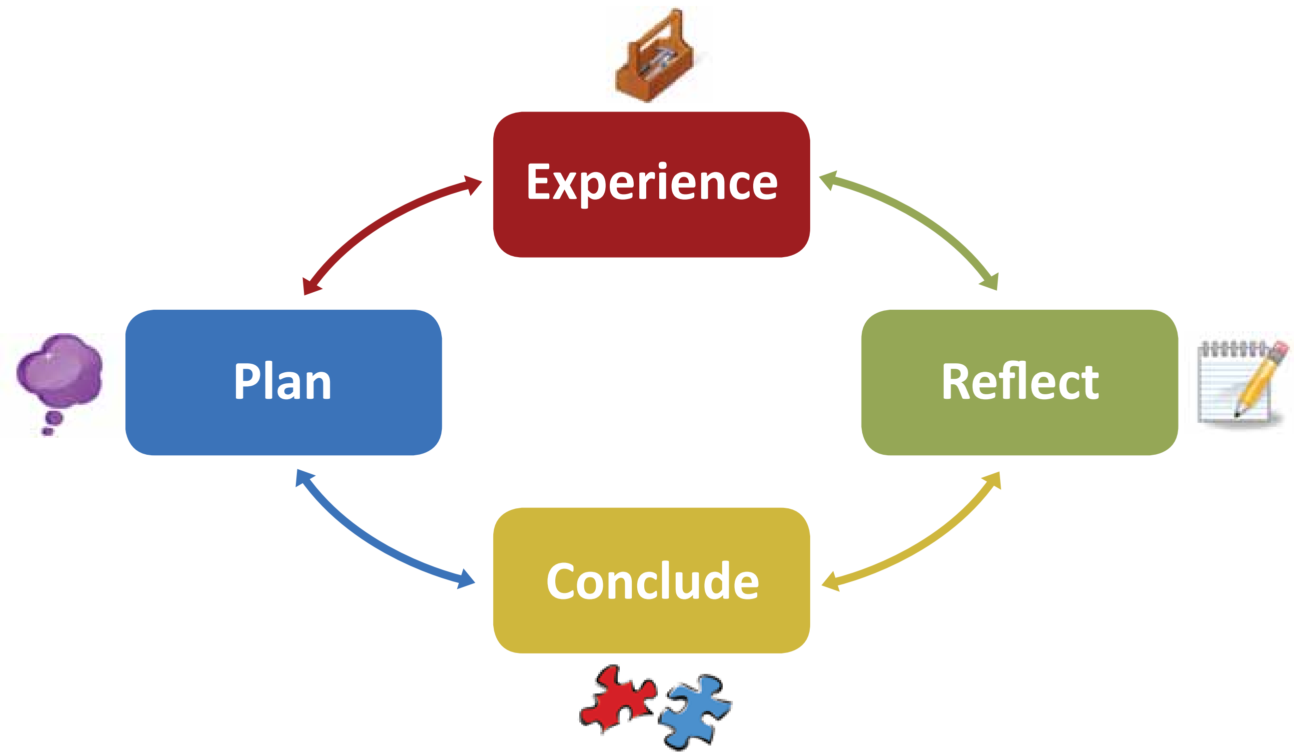
Starting with the familiar simply means finding ways to connect the content or subject matter of the training to participants' daily lives or to a common experience so that they are more at ease and feel that they are starting from a place of understanding.

Of course, it helps to find out as much as you can about the participants you will be working with before you even design the training. If you are not already intimately familiar with the group or audience you'll be working with, send out a questionnaire, short survey or even a modest pre-assignment that participants can complete in advance of the workshop and submit to you. This provides a mechanism to get to know them better and will help you anticipate their needs and perspectives before the training even begins.

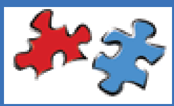
Section Three:
Incorporate the Learning Cycle

There are many theories about how adults learn and there are differences of opinion about which are most accurate. As practicing trainers, we have found that one approach broadly matches our experience in training environments, which is the learning cycle as outlined by David Kolb.[7]

Kolb noted that all learners need to go through a series of stages to learn most effectively. He defines the stages as the following:[8]



7 Kolb, David A., Experiential Learning: Experience As The Source Of Learning And Development, (Englewood, NJ: Prentice Hall, 1984).
8 The ideas for the images illustrating each stage of the learning cycle were taken from Alan Matthews' How to Design and Deliver Great Training, (HLS Publishing, 2012), pg. 36.

Experience 	You ***do*** something You try it out, you engage with the content, substance or idea.
Reflect 	You ***think*** about what happened You review the experience in the context of existing knowledge or information.
Conclude 	You ***make connections*** or ***draw conclusions*** about it You connect or identify what worked, what didn't, what the results were. Sometimes, you might even seek out additional information to help you make conclusions.
Plan 	You ***prepare*** to try again You plan to try out what you have learned, to keep the things that worked and perhaps to change the things that didn't work as well. You begin to take action on what to do next.

For example, if you were training on voter contact, you might:

1. Give participants a chance to experience voter contact through a role play exercise. ***Experience***
2. Ask participants to write down their thoughts individually on the exercise. ***Reflect***
3. Using participants' reflection notes as the starting point, lead a group discussion about the experience and identify common connections and conclusions. ***Conclude***
4. Ask participants to work in small groups to begin to plan a voter contact effort for their area. ***Plan***

Significantly, you can start anywhere on the cycle. Thinking about the example of voter contact again, you might:

1. Ask participants to think about their experiences with voter contact and the types of voter contact they have tried. ***Reflect***
2. Ask participants to work in pairs to identify what worked well and what was not effective in the approach to voter contact they have used in the past, then feedback their conclusions to the larger group. ***Conclude***

3. Use the conclusions to begin to construct a plan for practicing voter contact more effectively. ***Plan***
4. Give participants a chance to experience voter contact through a simulation, role play, or by going outside the training room to talk to real voters, using the more effective approach they have identified. ***Experience***

Then, after trying voter contact differently, participants would think about what happened, draw conclusions and essentially begin the learning cycle again.

In both of the examples above, you are taking people through the learning cycle, but starting at different points. Where and how you start can depend on the subject matter, the amount of time you have, the learning objectives, and the needs of your participants.

The important thing to keep in mind is that the whole cycle should be part of the learning experience. Review your lesson plan and ask:

- Are there opportunities for participants to actively engage with new information? For example:
    - Simulations
    - Team assignments or small group work
    - Problem solving tasks
    - Case studies

- Is there time to allow for reflection and discussion of the experience? For example:
    - Individual journals
    - Team or small group discussions
    - Facilitated brainstorming discussions

- Are there mechanisms that help participants draw conclusions about the content? For example:
    - Outcome mapping where the whole group maps the results of an exercise or experience
    - Discussions in pairs with learning partners
    - Snowball fight where each participant writes down a conclusion then crumbles the paper into a ball, all are thrown into the air and participants pick up a snowball that is not theirs and these are read out

- How will participants begin to plan what to do next with the new information? For example:
  - Personal action planning
  - Journals
  - Commitment statements

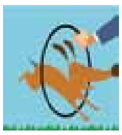
Section Four: Accommodate Different Learning Styles and Preferences

Here's a quick quiz. How many days are there from today until January 1 of next year?

Got an answer? Now, ask yourself how you tried to figure that out. Did you hum a rhyme you learned as a child about the number of days in each month? Did you take out a pen and a piece of paper and make a written calculation? Did you try to visualize some form of timeline in your head?

Your approach to answering this question is a reflection of how you like to process information. This is considered to be your preferred learning style.

A learning style is the way an individual prefers to absorb, process and act upon information and experiences. Nearly every adult gathers information in more than one way, but we all have a preferred way of doing this, which we started to develop in childhood. Our favored mode is the one that generally makes learning easier for us.



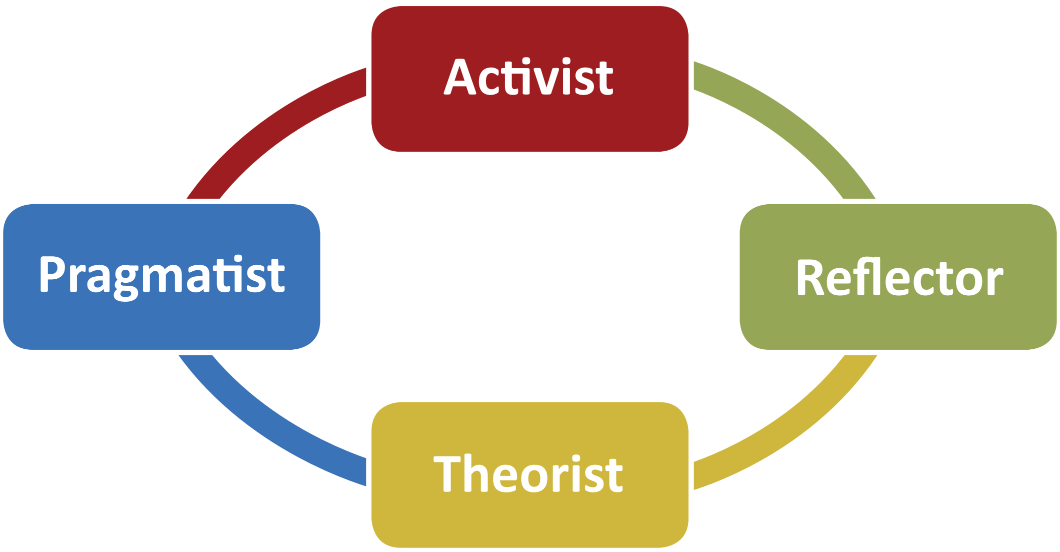
Learning styles are stable, meaning that we've gotten pretty good at using our preferred style in all the years we've been practicing it, but they are not fixed. Adults can adapt to different learning environments and situations in order to perform different tasks.

Here's another quick question. Think of two people from your own family who have been raised in a similar environment: two children, two siblings, two cousins, etc. Visualize them in your head. If you were to describe these two people to a stranger, would you use the exact same words, the exact same descriptions, the exact same tones of voice? It's not likely.

People are different. Even people from the same family raised in the same environment can be very different. The same is true for participants in a training. Each one will have a unique and varied approach to learning.

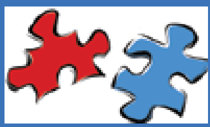
The good news amidst all of this diversity is that there will be multiple ways that participants can engage with the information and content in the training. The challenge for trainers is to figure out the best way to accommodate multiple learning styles in a singular training environment.

The best place to start is to develop an understanding of what learning styles can look like. (This can also help you identify your own learning preferences to ensure you're not training predominantly to styles that match your own.) A useful framework for this purpose is the one developed by Peter Honey and Alan Mumford,[9] based on Kolb's learning cycle.



9 Honey, Peter and Mumford, Alan; Manual of Learning Styles, (London: P. Honey, 1982).

Learning Style	Attributes	Activities
Activists 	Activists are people who learn by doing; they need to get their hands dirty Activists tend to be more open-minded rather than skeptical or hesitant Activists can be enthusiastic participants, but they also tend to be bored by elements of training that involve long discussions or planning Activists don’t mind making mistakes because they learn from them	Activists enjoy: • problem solving in teams • being thrown into a task without too much time to prepare • competitions • role-play • fast-paced environments
Reflectors 	Reflectors prefer to observe events from a distance, rather than jumping right in Reflectors like to collect data and do thorough research before making decisions; they prefer to “sleep on it” rather than making a quick decision Reflectors are more cautious and like to take all possible factors into account Reflectors tend to observe others and take a back seat in discussions; they are good listeners	Reflectors enjoy: • discussing ideas • having lots of time to prepare for a task • reviewing what has happened and thinking through what they’ve learned • structured methods for exchanging ideas and views • feedback from others, coaching, and interviews

Theorists 	Theorists like to understand the theory behind actions; they need models, concepts and facts in order to engage in the learning process Theorists prefer logical, step-by-step approaches; they are constantly asking how new information makes sense and how it fits with what they already know and understand Theorists can be perfectionists; they prefer certainty and are uncomfortable with subjective judgments or trivia	Theorists enjoy: • having time to explore the relationships between ideas, events or situations • complex or challenging situations where they have to apply their knowledge • structured exercises with a clear purpose • using models, statistics or stories that illustrate how to apply theories
Pragmatists 	Pragmatists are experimenters; they like to try new things to see how they will work in real life Pragmatists are largely practical people who like to act quickly and get things done Pragmatists treat problems and opportunities as a challenge	Pragmatists enjoy: • understanding how to apply what they're learning • having the opportunity to try out new techniques • discussion and time to think about how to apply learning in reality • case studies, project work, and problem solving

This framework provides a useful perspective on adults' approaches to learning and can help trainers think through how to structure their sessions and adapt content to be more accessible to different learning styles.

However, it is also important to keep in mind that few people fit completely and wholly into any of these categories. Everyone learns from more than one approach. No one has just one learning style – we all tend to use a combination of these, depending on the content, the situation, our own personalities, and other factors that may influence our learning on that particular day.

The key points about learning styles are:

- It's important to use a variety of activities, stimuli, media and training techniques to accommodate different learning styles. This variety will also help people remember better, which is discussed in more detail the next chapter.

It is important to keep in mind that few people fit completely and wholly into one specific learning style.

Everyone learns from more than one approach.

- Be aware of your own preferred learning styles so that you don't unconsciously train to that style alone. When you're designing session plans, look at how you've decided to approach different subject matter. Chances are that reflects your own preferred learning style. Regularly ask yourself how you could approach ideas differently.

- No matter what you're doing, there may be someone in the room who doesn't like this particular approach to learning because it's not close to his or her preferred style. Don't take it personally. The best thing to do is to explain why you're doing it this way to help keep them engaged, and to change activities regularly.

Chapter Two: Key Learning Points

1. Adults require respect to do their best.
2. Start with ideas, stories or concepts that would be familiar to participants, and build the training content from there.
3. Incorporate all stages of the learning cycle whenever possible. Be particularly mindful of providing participants with opportunities to reflect and draw conclusions from exercises, rather than just moving on to the next activity.
4. Develop content for multiple learning styles. Use variety and tools that appeal to all learning preferences.

Chapter Three: How Adults Remember

Take out a pen and answer the following question in the lines below.

1. What did you have for dinner last night?

Were you able to remember? How long would you estimate it took you to remember? Now try this question:

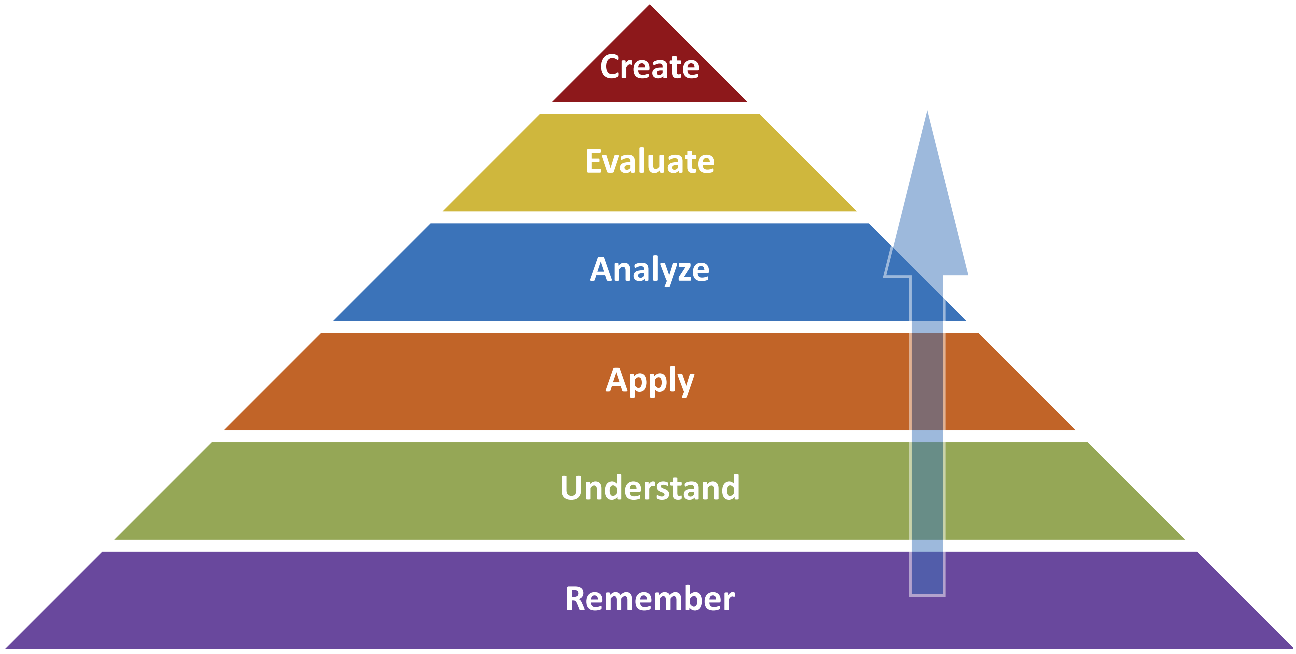
2. What did you have for dinner on this day two weeks ago?

Were you able to remember? If you were, how long do you estimate it took you to remember this time? What clues helped you to remember – could you tie it to a special occasion like a birthday or family event, or a significant business dinner, or something else that would have stayed in your memory?

Although different people learn in different ways, all learning starts with remembering. As trainers, the more we can do to help and support participants in absorbing and retaining information through memory, the more effectively they are going to use that information for the long term.

Benjamin Bloom was an American educational psychologist who helped devise what became known as Bloom's Taxonomy of educational objectives. (Taxonomy simply means classification.) The purpose was to help educators establish a clear vision for how learning should work and what learners should be able to do as their capacity or mastery of issues and skills advanced. The model looks like this:[10]

10 Benjamin Bloom chaired a series of conferences about education in the late 1940s and early 1950s. Bloom's Taxonomy was first published in 1956 in Taxonomy of educational objectives: The classification of educational goals. (New York: David McKay Company). Bloom's original model was revised in 2000 by Anderson and Krathwohl et al. The revised version appears here.



In this model, the basis of all learning starts with remembering. Like the great pyramids of Egypt or the Eiffel Tower, we need a strong and wide base from which to build in order to use learning for more refined and complex purposes.

This chapter focuses on specific techniques that trainers can use to help stimulate and engage memory in a training environment. It focuses on four approaches:

- **Section One: The Senses Assist Memory**
- **Section Two: We Remember What We Practice**
- **Section Three: We Remember What is Reasonable and Well-Organized**
- **Section Four: We Remember What is Repeated**

Section One: The Senses Assist Memory

Nurses in Ireland are some of the most caring people you will ever meet. They are kind and generous and compassionate, and very good at taking care of people.

Right after each of Shannon's children was born in the hospital in Ireland, the first thing the nurses did was to make her some toast and a cup of tea. It was a simple act of kindness, but it was done with great caring.

To this day, whenever Shannon smells bread toasting, she thinks of the joy of a new baby being born and simple acts of kindness.

This is the power of the senses. Memories are stored all over the brain, but when they are attached to a certain sensory stimulation as well, they are stronger and easier to recall.

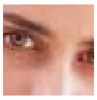
Memories are stored all over the brain, but when they are attached to a certain sensory stimulation, they are stronger and easier to recall.

Think of your own sensory connections that immediately bring up strong memories. What stimulates strong memories for you?

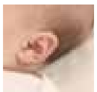
- the smell of something cooking
- the sound of a particular song
- the first signs of spring or a particularly brilliant sunset

Tying the senses to learning is a bit like the learning styles discussed in chapter two: we use all of our senses to learn and we change which sense we're engaging most heavily depending on the situation, but over the course of our lives we have also developed particular, individual strengths among our senses.

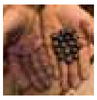
The three senses that are most highly engaged in training are:



Sight – visual learning



Hearing – auditory learning



Touch – tactile or kinesthetic learning

Of course, the senses of taste and smell are also always present, but unless you're training on cooking skills they're less likely to be at the forefront of learning. (Although Shannon does always bring big bags of chocolate for afternoon sessions to stimulate taste, smell, and try to create pleasurable sensations around sluggish post-lunch topics!)

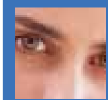
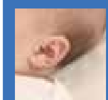
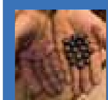
What does this mean for trainers? It means that in order to stimulate the senses, create sensory connections with information to help create stronger memorization and to accommodate different sensory strengths among participants, trainers have to keep the training room and the training content multi-sensory.

Create a Multi-Sensory Environment

It's important to create a training environment that engages all of the senses – particularly sight, sound and touch.

In recent years, it has become standard practice for trainers to develop a Power Point presentation and that is the extent of the materials they use. Auditory stimulation is limited to the sound of the trainer's voice and if there's any tactile engagement, it will likely be in the form of an exercise or activity.

This approach is leaving huge opportunities for learning behind and has become so standard now that this is what most participants expect. In fact, there are many more interesting, stimulating and much less electricity-dependent ways to engage all the senses in training:

Creating a Multi-Sensory Environment	
Visual Stimulation 	• Brightly colored flipcharts • Posters • Displays, images and charts • Welcome banners with participants' names • Multi-colored pens and markers • Training rooms decorated with different colors for name tents, notebooks, cups for water, etc.
Auditory Stimulation 	• Rhythm, rhymes and music • Chants, word association, song • Mnemonics, acrostics and catchy acronyms • Verbal interaction and discussion of ideas
Tactile Stimulation 	• Interactive exercises and opportunities to practice new skills or ideas • Group work and presentations • Physical objects or models that participants can create or handle • Fiddle toys such as play dough, bendy men, pipe cleaners, etc.

Section Two: We Remember What We Practice

Within 24 hours after leaving a training, people may have forgotten up to 70% of the detail of any information they heard. This is the result of a process in the brain called pruning, in which information that is deemed to be non-essential is not transferred to long-term memory.

How do we help stop this information leakage from the brain? We take people fully through the learning cycle and give them opportunities to practice or rehearse new skills.

Without making things too confusing by bringing in additional research, the following statistics are also in circulation in the training community. They suggest that we learn:

- 10% of what we read
- 20% of what we hear
- 30% of what we see
- 40% of what we see and hear
- 50% of what we discuss
- 70% of what we experience[11]

If these figures are accurate, then providing people with the opportunity to experience new ideas and information would be a perfect antidote to the level of forgetting that would happen otherwise!

Whether or not it's a perfect statistical fit, it has been our experience as trainers that people absolutely remember, absorb, understand and master information more quickly and completely when they have the opportunity to interact with it. Consider the differences in the following table.

11 United Nations, Economic and Social Commission for Asia and the Pacific, Train the Trainer: Training Fundamentals (2001), http://www.un.org/esa/socdev/unpfii/documents/trainingmodule_en.pdf, accessed June 2014.

Topic	Ideas in Theory	Ideas in Practice
Public Speaking	Listening to a presentation on how to make a good public speech	Writing and delivering your own speech to a live audience
Door-to-Door Canvassing	Watching a video about how to conduct door-to-door canvassing	Writing a script and going to a local neighborhood to canvass real voters
Policy Development	Reading a manual on how to develop policy on specific issues	Researching and writing an actual policy proposal on a critical social or economic issue, then presenting to an audience at a public forum

We learn actively, not passively. This is why lectures and Power Point presentations alone have limited impact. Therefore, it is important that trainers provide participants with the opportunity to not only see, hear and talk about new ideas, but to actively put them into practice.

Additionally, the more people have the chance to rehearse their new skills or ideas, the more proficient they will become. Think of the first time you tried something new: riding a bike, speaking a different language, giving a presentation to a large group, etc. If you've had the chance to practice that same skill several times since that first time, there's a pretty good chance you've gotten better at it. We like what we're good at and we try hard to remember how to do it well.

Section Three: We Remember What is Reasonable and Well-Organized

This chapter focuses on four approaches to training that help adults remember. These are: engaging the senses, giving people the opportunity to practice using new skills or information, delivering information in a manner that is reasonable and well-organized, and using repetition.

Now, close this book or turn it over and see how many of these approaches you can remember without looking at the manual. Then, come back to this page.

Well, how did it go? Did you remember them all? Chances are you forgot or hesitated on one or two of the approaches and had to look for clues or come back to the page in order to recollect them all.

What if, rather than just listing the approaches off in a single paragraph, we had presented them in the following way, as the acronym SPOR (which, in English, is akin to the word "spore" or seed):

Senses – engage all the senses

Practice – give people a chance to practice new skills or information

Organized – present new information in reasonable, well-organized chunks

Repeated – use repetition to create memory

Would these four points be easier to remember now? It's essentially the same information as what was given in narrative form in the first paragraph of this section, but it's organized differently in a manner that is easier to absorb and understand.

How a trainer organizes and presents information has a big impact on participants' ability to remember it. When an individual is in a receptive state for learning, they will take in new information and store it in their short-term memory. From there, the brain will ultimately make a decision about discarding the information because it is not perceived as relevant, or transferring the information to long-term memory because it has essentially been tagged as important.

Trainers need to introduce information in ways that make it as easy as possible for participants to absorb, understand, engage with and build on new concepts. This is how participants make these ideas their own and, therefore, mentally tag it as important.

Introduce Information in a Logical Sequence

Training content should move in a logical sequence, a bit like building a house or, to borrow again from the ancient Egyptians, a pyramid. Start with a broad, strong foundation and then build from there. In other words, introduce a topic by building a general understanding of what it is and why it's important, and then bring in more complex or detailed elements.

Consider the building blocks around which a voter contact training might be built:

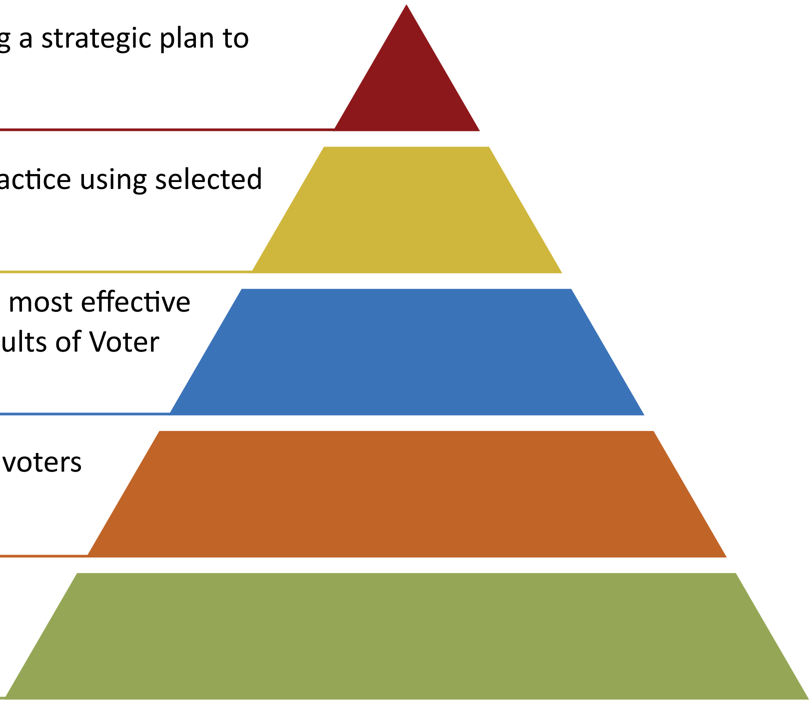
Voter Contact Planning: Constructing a strategic plan to implement a voter contact effort

Voter Contact Practice: Hands-on practice using selected voter contact methods

Voter Contact Methods: Identify the most effective voter contact methods, based on results of Voter Targeting

Voter Targeting: How to identify the voters you want to talk to

Voter Contact: What it is and why it's important



In this example, each additional phase of the training builds on the results of the previous session and moves in a logical sequence that allows participants to progressively advance their understanding of how to approach and implement voter contact efforts in a strategic and effective manner.

There are other ways to think about how to logically organize information. What if you were given the list below:

Monkey
Rhinoceros
Dove
Tiger
Hawk
Cow
Elephant
Horse
Bluebird
Raven
Sheep
Elephant
Crow
Python
Goat

Would the list on the previous page be as easy to remember as the same information organized in this way?

Birds	Farm Animals	Jungle Animals
Dove	Cow	Monkey
Hawk	Horse	Rhinoceros
Bluebird	Sheep	Elephant
Raven	Goat	Python
Crow		

Again, it's the same information but organized in a way that makes it easier for the brain to process, make connections, find meaning, and store as memory. Additionally, the colored headings (if you're getting a colored version of this manual) help the brain to make associations with each of the categories – blue for the sky that is the domain of birds, brown for the soil of the farm, and green for the leafy jungle.

Organizing information into meaningful groups like this also helps create a logical framework for participants to understand and absorb new ideas.

Divide Information into Reasonable Chunks

What's a reasonable chunk? Research indicates that the brain cannot absorb more than seven pieces of new information at a time. Then, it either has to take a break to process the information or erase something from memory to make room for more.

From her experience as a trainer, Shannon would be even more cautious than this. In most workshops, particularly when participants have to deal with the additional mental burden of translation, Shannon likes to limit the focus to mastery of three new ideas or skills in one day. For intensive, advanced or master's courses, she'll raise the limit to five, but never more than that.

What does this mean for trainers?

Breaks are important. Coffee and lunch breaks are not only a chance for people to post a selfie on Facebook, smoke 10 cigarettes, and charge at the buffet; breaks give the brain a chance to process information and make room for more to be absorbed.

Sessions should be kept to a reasonable length. Unless participants are working independently (on their own, with no trainer talking) on a project, presentation, or assignment and need a longer stretch of time to complete the task, sessions should not exceed 90 minutes in length. Some trainers will even stop every hour to take some form of a break to let participants' brains catch up.

Longer days don't mean more learning happens. As trainers, we're as guilty as everyone else – we're trying to deliver a training, the logistics have been a nightmare, it's been nearly impossible to get the right people in the room, so we think, "Ah ha! Now that we have them all here, we'll also cover this, and this, and this, and this, etc." We scrap the original agenda, add several new topics, and decide to start the day at 8:00 am and keep everyone there until 7:00 pm.

While we may have everyone in the room until that time (if they're exceptionally polite people), it doesn't mean that any learning is actually happening. After a while, people's brains are essentially full and they can't take anymore. We've left the "reasonable chunk" zone and the entire room is now staring at the clock, in full endurance mode, trying to get a glimpse at Facebook for a bit of a jolly whenever they can.

The term "paying attention" in English is actually a direct metaphor for how the brain works. It's as if every day you wake up with a certain number of coins you can spend that day. You spend them in the form of attention – you actually give those resources to the task you're doing as you "pay attention." Once those coins are gone, they're gone.

There are things we all can do to increase the number of coins we can access every day. Getting enough sleep, having access to proper nutrition, engaging in exercise and physical movement, using breaks wisely – these all play a role in our capacity to pay attention. But still, at the end of the day, when those coins are gone, they're gone.

Section Four: We Remember What is Repeated

Can you still remember a poem that you learned as a child, many years ago? What about your multiplication tables that you probably had to memorize?

Rote learning is a form of memorization based on repetition. Back when we were in school, many of us had to memorize certain things – like poems or multiplication tables, or even large pieces of text – and then simply repeat them verbatim in order to get a good mark.

Rote learning works to a degree: the endless repetition of the same words or phrases helps transfer the information in our brains from short-term to long-term memory. However, what rote learning does not do is help us develop the skills to move further up the pyramid of Bloom's Taxonomy so that we can not only recite the information, but analyze it, critique it and use it to come up with something even more creative.

In training, we borrow the principle of repetition to help people learn, but then pull in the other aspects of higher thinking skills as well. How do we do this?

- Ask participants to rephrase key points in their own words, or give their assessment of what they thought the main points were from a session
- Have a group discussion about key learning points, asking participants to note them on flipchart paper in front of the whole group (rather than the trainer or staff doing this)
- Toss a ball around the room and ask whoever catches it to state what they think the most important point of the day or session was
- Have a contest as part of the final session, asking participants to work in teams to design a poster illustrating the most important points from the day
- Ask participants to work in teams to identify the main points, list them on a piece of flipchart paper and present these to the entire group for discussion
- Make up a song, poem, chant or rhyme about the key points that can be repeated throughout the day
- Ask participants to interview each other in pairs about what they thought the most compelling points of the session were

We build repetition and reinforcement into the curriculum by working in exercises like these. So it's not just the dreary work of repeating something over and over – each of the activities listed above involves a certain level of evaluation, understanding and analysis as well. Participants aren't just memorizing, but using the activity as a chance to move further along the learning cycle.

Even with these techniques embedded in the agenda, trainers play an important role in simply reminding people about key points and helping to make links with what's coming next. In addition to providing participants with the opportunity to identify and reflect on key learning points, trainers should regularly recap and review the ground that has been covered. These are not long speeches, but brief reminders of the road on which participants have already journeyed and where they stopped to learn something interesting along the way.

Recaps are particularly important in a multi-day or intensive training session to help participants keep those links in mind. The rule of primacy and recency tells us that people are more likely to remember what they heard at the beginning (primacy) and near the end (recency) of something. Therefore, the openings and closings of topics or sessions give trainers a chance to reinforce information and ideas, benefiting from the stronger recall that comes with primary and recency.

Using visual and auditory triggers will further reinforce this. Revisit the Power Point slide, flipchart page, poster or drawing that was originally used to make the point. Hold up the models or other work that was created by participants during the practice exercise. Sing the song or cite the rhyme that was used to introduce the topic. All of these forms of simple repetition will help participants turn information into memory.

A Note on Computers in the Training Room

There is now substantial evidence that learners remember and retain information better when they take notes by hand, rather than on a computer.[12] Additionally, laptops, tablets and larger smartphones can be a real distraction in a learning environment, not only for the people using them but for those sitting around them whose fight or flight response can be triggered by the light and movements on a screen. For these reasons, we often work a "no screens in the training room" agreement into the ground rules.

Chapter Three: Key Learning Points

1. Create a multi-sensory training environment to help stimulate learning and help participants make sensory connections with training content.
2. Ensure participants have the opportunity to rehearse or practice new skills and ideas.
3. Organize information in a logical sequence and in reasonably-sized chunks.
4. Use repetition as a tool to help people remember.

12 http://www.theatlantic.com/technology/archive/2014/05/to-remember-a-lecture-better-take-notes-by-hand/361478/, accessed June 2014.

Chapter Four:
Designing Content and Structure

You've just been asked by a local organization to deliver a training on leadership skills. Great! That's very exciting!

There's only a few small problems: you've never trained on this topic before, you're not sure you know enough about it to deliver a decent training, and you don't know where to begin.

Don't panic. This chapter will walk you through all of the procedural steps that you can take to construct a strong training, even on a topic that's new to you. And, if you follow all the guidelines on delivery outlined in the other chapters of this manual, you'll deliver a solid, effective workshop.

This chapter will cover the mechanics of designing content and structure for trainings and workshops.

- **Section One: Constructing Objectives and Outcomes**
- **Section Two: How to Choose and Organize Content**
- **Section Three: Openings and Closings**
- **Section Four: Length and Timing**
- **Section Five: Designing Your Own Training vs. Training to a Pre-Set Curriculum**
- **Section Six: Tips for Co-Training**

Section One:
Constructing Objectives and Outcomes

When constructing a training session, start by asking a few fundamental questions:

WHO?	Who is the training for? What do you know about them?
WHY?	Why is the training needed?
WHAT?	What should the results of the training be (in terms of KSA)?
HOW?	How is the audience currently connected to this topic?

You need a sense of who the participants will be and why this topic is relevant, interesting, or important to them. (Or maybe it isn't considered important by the participants themselves, but someone else thinks they need it, like a supervisor or a manager. Then you could be walking into a room full of people who don't want to be there. We'll deal with those dynamics in the next chapter.)

What level of information are the participants likely to have on the topic? Is this a new concept, something they've done before but need to hone their skills or, as is often the case, will you be working with a group with mixed exposure and ability?

Once you've answered these questions as a starting line, the next step is to skip to the very end. Once this training is over, what will the results need to be? In other words, what should participants be able to think (knowledge), do (skills), or feel (attitude) at the end of this training?

The KSA of trainings are defined in the form of learning objectives and learning outcomes.

Learning Objectives

Learning objectives are action statements that specify what the learner will be able to do as a result of the training program. They are typically written in behavioral terms, meaning they describe certain behaviors in which participants can engage subsequent to the training.

In terms of KSA, learning objectives focus on knowledge and skills. They are measurable – you would be able to assess or evaluate whether or not participants gained or improved these abilities – and should be as specific, detailed, and precise as possible.

Learning objectives ***are not*** a description of what the trainer will do or teach, or a summary of the training topic, or an outline of the training. Learning objectives are about connecting the content to the participants, not describing the content on its own.

Objectives and Outcomes

Learning objectives are action statements that specify what the learner will be able to ***do*** as a result of the training program. They focus on knowledge and skills.

Learning outcomes describe how people should ***feel*** as a result of the training. They focus on attitudes.

Consider the sample learning objectives below, constructed for a Train the Trainers program. As a result of the training program, participants will be able to:

- Understand the difference between training and teaching, and distinguish among the types of skills associated with each
- Prepare for a training session, including constructing effective learning objectives and outcomes, and writing an appropriate agenda
- Apply adult learning concepts, develop a supportive training environment, and design materials to meet multiple learning styles
- Use effective training methods including exercises and activities, creative information delivery, facilitation, effective questioning techniques, and giving and receiving feedback

Construct learning objectives to keep the content of your trainings focused on delivering real skills and information to participants, and to give you a sense of how best to manage the time you have. Use action words when writing these objectives, so that you maintain a vision for what the participants should actually be able to do once they walk out the door, and so you can build the subject matter around this vision.

Typical action words used in constructing learning objectives include:

To write	**To implement**	**To distinguish**
To deliver	**To understand**	**To construct**
To organize	**To lead**	**To design**
To create	**To mobilize**	**To prepare**

Learning Outcomes

Let's say you delivered an amazing training on voter contact. Participants walked out of the training with an exceptional understanding of what voter contact is and how it can be implemented.

But, they're not convinced it will work for them. Or, they didn't really find it all that interesting. Or, they're not confident that they can actually do it themselves.

Will much change for these participants? How likely are they to actually use the knowledge and the skills that they learned? Pretty unlikely, we'd guess.

In learning new skills, we don't just engage our brains but also our feelings and our emotions. It doesn't matter how much knowledge we have about a certain subject if we don't feel that it's important or interesting.

Learning outcomes focus on how we want people to feel as a result of the training, the attitude component of KSA.

How do we want learners to feel about the subject matter? How do we want them to feel about their own abilities? How do we want them to feel about putting these new ideas into practice? All of these questions are an important consideration before designing any training as these learning outcomes have a big impact on how both the content and the social aspects of the workshop are constructed, and should influence how the trainer communicates with participants.

Consider the examples below from a training on policy-based advocacy. As a result of this workshop, participants will have the attitude to:

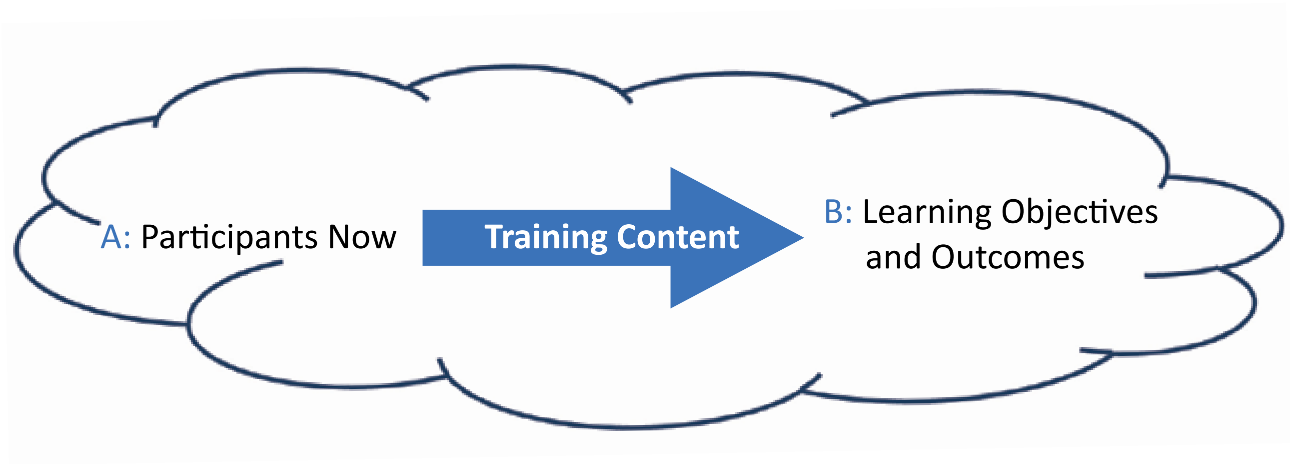
> Feel confident in their understanding of the types of research needed to build strong evidence-based policy, and their ability to find or conduct this research
>
> Feel enthusiastic about their ability to construct viable policy solutions to local problems, and advance these through advocacy campaigns

Language typically used in defining learning outcomes includes:

Inspired	**Confident**	**Motivated**
Enthusiastic	**Energized**	**Supportive**
Reflective	**Engaged**	**Inspired**

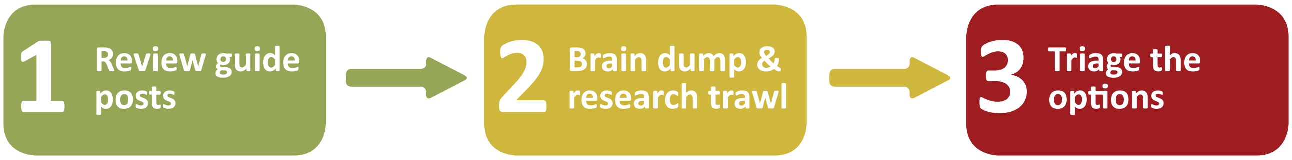
Section Two:
How to Choose and Organize Content

Once you've answered the fundamental questions of who, why and what, and written your learning objectives and outcomes, you will have established the two bookends of your training: your starting point and your end point. These should serve as guide posts for figuring out what should go in the middle – the actual content of the training.

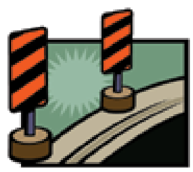


Choosing Content

What's the best way to get from point A to point B? How you actually do this is going to be influenced by your own preferred working and learning styles. However, we have found a three-step process that works well for most trainers:



1. Review your guide posts



Before you write a minute of training content, review again what the answers to your fundamental questions have told you about your participants, and what you have established as your learning objectives and outcomes. These are important guides and need to be at the forefront of your mind when constructing the actual content.

To ensure she doesn't stray from these guide posts when it comes to writing the actual content, Shannon prints out the answers to the fundamental questions and the learning objectives and outcomes and posts them above her desk. Whenever she has to make a choice about what to cover, she goes back to these pieces of information to inform her decisions.

2. Do a brain dump and/or research trawl

Your own learning style and how you prefer to process information will affect how you approach this next step. Essentially, what you are trying to do is to gather as many resources as you can about the subject or topic.

Start by writing down everything that you know or understand about the issue. Then, collect all of the additional information you can: look at videos and presentations about the topic online, pull together any recent research or evidence about it, seek out experts and thought leaders in this area and ask their opinions, buy or borrow new publications on the subject. Essentially, go fishing for as much information as you can about the topic and cast a very wide net.

Gather as many reliable sources of knowledge, analysis, and information as you can, but check references and reviews to make sure your sources are credible. Get to know the material that you've collected.

What you are essentially doing in this step is teaching yourself, i.e., bolstering, expanding and enhancing your own understanding of the topic so that you can train on it as effectively as possible. Do you recall that chart from chapter three, section two about what percentages of information we remember? Well, there's one more line that comes at the end of that particular piece of research that suggests that we remember 90% of what we teach because our interaction with the information is so intensive.[13]

3. Triage the options

By now, you will have a reasonable pool of resources from which to build your training. From here, take one last look at your guide posts (the answers to your fundamental questions and your learning objectives and outcomes) and start to sort the information into three categories, using a system akin to an upside-down traffic light:

Essential → This is content that **<u>must</u>** be covered because it is essential to understanding the subject manner and/or contributes to meeting learning objectives and outcomes.

Desirable → This is information that is potentially useful which **<u>could</u>** be covered if time and other circumstances allow.

Non-Essential → This is subject matter which should **<u>not</u>** be covered because it's not relevant, doesn't contribute to meeting learning objectives and outcomes, or it's the wrong level for this group.

13 The final line of the research, suggesting that we remember 90% of what we teach, was not included in the version of the chart printed in chapter two of this manual because it wasn't relevant to the point that was being made, adhering to step 3 on this page about triaging content.

These simple steps provide a reliable process for collating all possible content for a training session, and then making a guided decision about what to actually use. The important point to keep in mind is that you don't have to use everything. In fact you ***shouldn't*** use everything. It is better to be clear, focused and concise than to bombard learners with more information than they could ever possibly process or use.

Keep your choices strategic: ***what will help this audience interact with the information in the best possible way and provide the most effective route to reaching the learning objectives and outcomes?***

What do you do when you have too much content?

Sometimes, you have to find a way to deliver more information than time (or the human brain) will really allow. Or, you arrive at the training and find that the participants are less familiar with the subject matter than you had anticipated, so you have to go back a few steps and take things slower. What do you do in these situations?

There are a few options:

- Create a workbook, manual or other written resource that participants can take home with them for further exploration of the topic.
- Divide the content in half (or thirds, depending on the situation) and schedule a follow-up session to cover the additional material. In these situations, it can be useful to give participants a task to complete before the next session to keep some mental connection to the subject matter.
- Allow some of the work to be completed as an independent task, in teams or as individuals, with a firm deadline, a reliable process for making sure it's handed in, and a means to provide feedback.
- Post additional materials on a website that's easy to access or circulate materials via compact discs, flash drives, whatever mechanism people can use. Again, include some form of task or follow-up meeting to ensure participants have both used and understood the content.
- Create a Facebook or other social media group to continue the discussion.

Organizing Content

With a decent pool of subject matter resources now staring at you from your desk or computer screen, the next step is to figure out how to organize this heap into an actual training. There are a number of tools to help you do this. The one you choose should fit your personal style as a trainer and your preferred way of managing information.

As you consider the options outlined below, keep in mind the advice from chapter two about how to organize content to help participants remember. And also, remember this: Power Point (and similar slideshow formats) are meant to function as visual aids to assist learning – they are not a means to organize your notes as a trainer! Trainings in which they are used for this purpose are really just tests of endurance for participants.

Commonly used formats for organizing the flow and timing of training content and activities include:

Session Plans

Affinity Diagrams

Mind Maps

Session Plans

Session plans are one of the most commonly used planning tools for organizing a training session or workshop. These are also referred to as training outlines or learning plans.

Session plans are an organized and structured outline of the subject matter you will cover in a training, the methods of instruction you will use, the timing of activities and breaks, and the resources you will employ. These plans serve as a form of road map that you will use to guide your participants towards the defined learning objectives.

There is no single way to construct a session plan; they can be formatted to accommodate any subject matter or learning objective. They can be as simple as a brief outline or more detailed with scripts for what you will say, prompts or cues for when you will introduce new information or exercises, and even color coding for easy reference. See the following sample:

Learning Objective:			
Subject/Content:			
	How to do this? Learning methods and/or training tools that will be used	**How long to do this?** Length of time of this portion	**What else do I need?** Resources, training materials, training toys, etc.
Introduction/Set Up			
Content Exploration, Part 1			
Content Exploration, Part 2			
Content Exploration, Part 3			
Closing/Set Down			

Other areas that trainers may include in session plans are: key points, evaluation or learning check, or learning styles check. The structure and format you use should be guided by your own needs.

Think through the information you will need and how you are likely to put the plan to work. Will these be the notes you use to deliver the training itself? Then you may want more detail and a format that's easy to reference while presenting. Or, are you more likely to use the plan as a skeleton structure and build the actual "meat" of the training using other tools? In this case, a simple outline might do the trick. Are you co-training with someone else? Then more detail will definitely be needed, including who will cover which stage of the training.

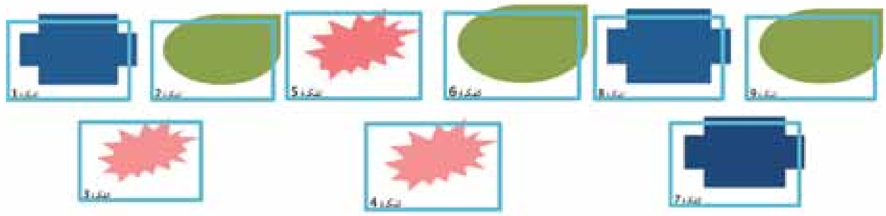
The key is to use the session plan to help you think and plan through every stage of the workshop so that you are fully prepared and able to facilitate a program that takes participants on an enjoyable journey to achieving the learning objectives.

Affinity Diagrams

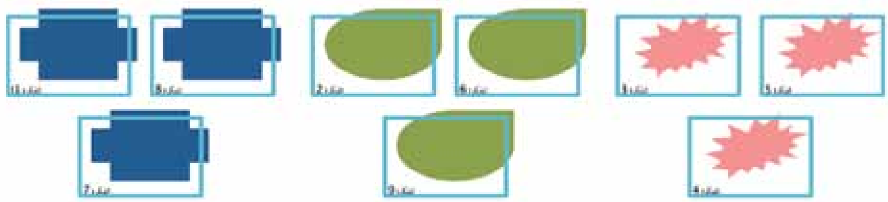
Affinity diagrams are simple tools used to organize ideas and information. They are particularly helpful to use when you are writing a training session on a new topic or one on which you have never trained before, or when you are working with a lot of resource information and you're not certain how to arrange or structure it as a training session.

Affinity diagrams simply involve organizing information or ideas into groups based on similarity or natural relationships.[14] To do this in a structured way:

1. **Write down each topic or idea on a small piece of paper (like sticky notes or note cards).**
2. **With the papers spread out in front of you, look for ideas that appear to be related.**



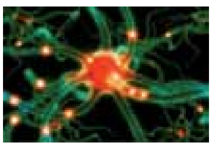
3. **Sort the papers into groups with similar themes or logical connections until all the papers have been used.**



If there are any ideas that don't seem to have a logical connection with any of the groups, consider whether this is a topic or concept that actually connects to your learning objectives, and whether or not it needs to be covered in this session.

You can now use the groups you have formed to identify a logical flow to your training, with similar ideas supporting one another and each topic connected to the next.

Mind Maps



Mind maps are also known as spider maps or flow maps. In the context of organizing a training, they are a means to map out the course and sequence of content in a way that allows the trainer to see the whole picture at once. These types of maps provide a much more visual format than other planning tools.

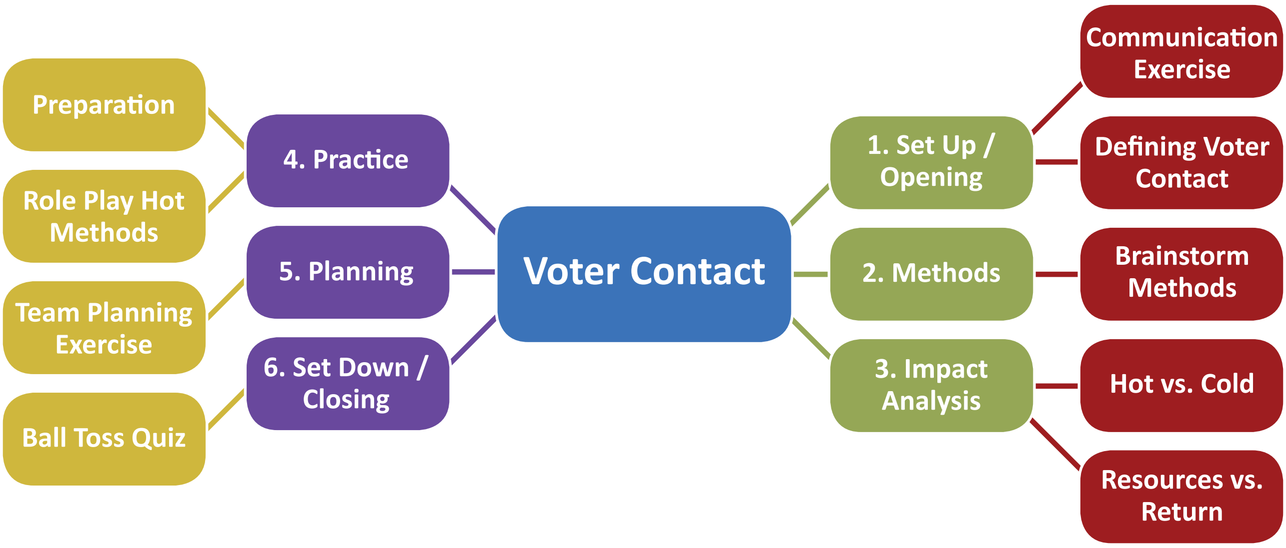
Mind maps are about carving pathways for information, energy and ideas to move in a harmonious and connected sequence around a training. The core design of a mind map mimics the shape of a neuron, the basic working unit of the brain that transmits

14 The term "affinity diagram" and the method described in this section were devised by Japanese anthropologist Jiro Kawakita in the 1960s.

information to other cells. As such, it is much more free form than rigid and can adapt to any training approach.

To construct a mind map or spider map, start with the subject matter or topic in the center, and then move from the top of the map (or the spider's front legs) in a clockwise direction, outlining how each aspect of the topic will be explored. Again, this is a flexible model, so if you are writing in Arabic, Persian, Urdu or any other language that flows from right to left, simply change the order in which information flows along the legs of the spider or the dendrites of the neuron.

Below is a model of a mind map used to plan out a training on voter contact.



There are a number of software packages available that allow these types of maps to be constructed electronically. Most cost money, but there are a few open source options including Coggle, which is a free, online collaborative tool that requires a Google+ account.

Don't forget that the old fashioned method is always available as well – mind maps can easily be written out by hand. In some situations, they may work better this way.

Section Three: Openings and Closings

Imagine you are the captain of a spaceship, bringing civilian passengers into space for their very first time. Your task is to gently but firmly lift your aircraft off the ground, through the density of the earth's atmosphere, and into space where you masterfully balance the speed and direction of your craft with enough precision to maintain a perfect orbit. From this unique perspective, you offer your passengers a glorious view of the world around them and the experience of a lifetime.

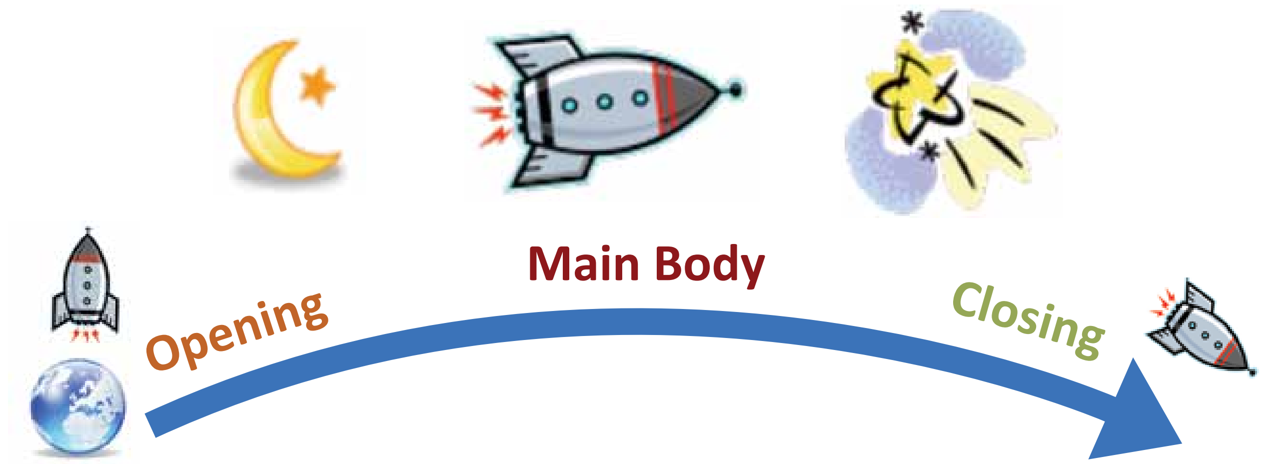
Then, having explored this small slice of the universe, you gracefully reduce your speed to allow the soft tug of gravity to deliver your passengers back into the earth's warm embrace, with their heads and hearts full of the wonder of adventure and exploration. Or, you could just blast the ship into space, give everyone onboard whiplash, put the gas pedal to the floor and speed around the earth a couple times, and then crash down into a body of water somewhere, thank everyone for coming and hop onboard a passing fishing boat to get yourself home.

Which, do you think, would be the better experience for the passengers?

In some ways, the options for trainers are the same. You can just jump right in there, get to the subject matter, deliver the content, and send everyone home. Or, you can use the opening as a "set up" to skillfully create a receptive state for learning, to put the participants at ease and make them open to learning. And you can use the closing as a form of "set down," to taper the content to a logical conclusion, to allow the participants to complete the learning cycle through debrief and discussion, to bring in repetition and review to help them remember.

Huge opportunities to initiate and complete the learning cycle are lost when trainers fail to facilitate a proper opening and closing for each topic or session. Openings and closings do not have to be complex or long, but they do serve an important function as a means to help participants prepare for and process information, and to organize it more effectively for their own learning.

As such, the movement and momentum of a training session can flow like an arc.



How do you launch a spaceship and make an arc in a real live workshop? Think through what it is you need to achieve in each phase of the training and match your tools to create this.

	Opening	Main Body	Closing
What You Are Trying to Achieve	Get participants' attention Create ease Create interest Clarify what's happening Motivate participants to become involved	Engage participants in the content of the training	Repeating Reinforcing Creating opportunities for participants to process information and practice new skills
How You Are Doing It	Quote, joke or story Song or game Visual aids Asking participants questions about themselves Discussing benefits of the training Active introductions and participatory learning contracts Discussing aspirations Reviewing agendas and logistics Smiling!	Connecting problems and solutions Analyzing the present and planning for the future Posing questions for participants to answer Introducing content in manageable chunks Using visual aids and creating a multi-sensory environment	Large group debrief Discussion groups Team tasks with presentations and discussions Ball toss quiz Individual presentations with feedback session Verbal or written evaluation Discussions in pairs with a "learning buddy" Journal writing or written reflection

Section Four: Length and Timing

To continue with the spaceship analogy, the next important question for trainers is how long can you keep people in orbit? How long can your passengers be strapped into their seats before they want to jump out the window, even without an oxygen mask? In other words, how long should each training session be?

The answer is: it depends.

70/30 Split

Participants should be in charge of their own learning and actively engaged in the training at least 70% of the time.

The trainer should be the only person talking or leading no more than 30% of the time.

Chapter three talks about offering information in manageable chunks so that participants do not become overwhelmed, exhausted, or frustrated. This generally means keeping sessions to about a 90 minute limit before stopping for a break in some form. But if the content is dense or complex, you may need to stop sooner. Conversely, if participants are working independently on a project that is interesting and energetic, you could easily go for longer.

The best guideline to use when looking at how to manage time is the 70/30 split – participants should be in charge of their own learning and actively engaging with the information at least 70% of the time; the trainer/facilitator should be the only person talking or leading no more than 30% of the time.

If participant-led content and activities drop below 70%, you need to ask yourself why and whether this is the best approach. Remember, we learn actively, not passively. And trainers are facilitators of knowledge, not lecturers or presenters.

Once you have written your training session, review it once more and ask in each step along the way, "What are participants doing now?" If they're up on their feet, in motion and/or active, exploring or explaining new ideas, you have more time with which to work. If they're sitting listening, you've got far less time with which to work. In terms of verbal delivery of information (i.e., you, the trainer, simply talking), think of the guidelines for Ted Talks[15] – present well-informed ideas in under 18 minutes. After that, impact and retention decrease substantially.

15 TED is a non-profit organization dedicated to spreading ideas through the sharing of short, powerful speeches. See http://storage.ted.com/tedx/manuals/tedx_speaker_guide.pdf, for guidelines on the format. (Link accessed June 2014).

Section Five:
Designing Your Own Training vs. Training to a Pre-Set Curriculum

Designing a solid training is hard work and takes a lot time. Generally speaking, Shannon plans three hours of preparation time for every one hour of training, including researching, writing and formatting materials, designing activities and exercises, planning the supplies that will be needed, and so on.

The other aspect of training preparation that takes time is rehearsal. Effective training engages not only a trainer's intellectual capacity, but also their social, communication, and presentation skills. You have to know what the materials, the content, the exercises, etc., sound like when they are spoken out loud and get a sense for how the flow is likely to work. This requires actively walking through the training session in a form of dry-run, similar to the rehearsals an actor would engage in before a performance or the run-through a surgeon would lead before a major operation.

Rehearsing new skills and ideas during training sessions helps participants solidify these abilities, and the same is true for trainers. Practicing the delivery of actual training content is a very effective form of preparation.

Therefore, when you commit to leading a training, make sure you have enough preparation time in advance to get yourself and your materials organized, and to try out what you plan to deliver.

This final step is even more important when you are training to a pre-set curriculum. Although it can be a relief to be asked to deliver a pre-set curriculum because you don't have the workload of writing and organizing your own training – a pre-set curriculum means the content has already been written by someone else – it can actually take just as long (if not longer) to learn.

When you are the creator of your own training, the research and writing phase is actually also a learning phase: you are learning the content as you go and making your own choices about what is essential and what is not. As you progress, your brain is moving information to long-term memory because it has been consciously tagged as important, so your mastery of the subject matter increases as you construct.

When you deliver content written by someone else, this step is taken away, which means that the rehearsal phase becomes even more important.

You will have to review the materials to get to know them well and integrate them with your personal training style. It is very important that you have a clear understanding of the learning objectives that are tied to the specific content you are delivering, so that you can keep your delivery within those parameters. Many pre-set curricula are designed in a building block format – one piece builds on top of another – so it is vital that you know exactly what is supposed to be in the bricks that you are laying so that the structure stays solid.

Section Six:
Tips for Co-Training

There are a lot of benefits to co-training. Having more than one trainer offers variety and diversity to participants and can help keep energy levels high. Trainers working in pairs or teams can serve as resources to one another and are often a great source of new ideas and constructive feedback.

But co-training can also be a lot of work and, if it's not done well, can go very badly. Here are our tips for working with other trainers.

Have clearly defined roles

Be very clear about who is doing what and who is delivering what. Stay focused on delivering the learning objectives for which you are responsible, and stay supportive of other trainers delivering theirs. Agree what roles the other will play when they are not the lead trainer. For example, will they be available to help write on the flipchart or distribute materials?

Rehearse together

If preparing for your own training by doing a dry-run is important, it can be even more vital when trying to choreograph the efforts of multiple trainers. Find ways to walk through the content together. This doesn't have to be in a strict rehearsal form per se where you go through every word verbatim (although in some situations, this might be a good idea) but you need to have a clear sense for how you will coordinate your efforts as seamlessly as possible.

Even when you're not training, you're training

One of Shannon's pet peeves in a co-training situation is when a trainer finishes his piece and hands-off to the next trainer, then immediately sits down and whips out his phone or computer and hops on Facebook or starts sending text messages to friends. This trainer is sending a clear message to all the participants that what is being covered now is not worth paying attention to.

If you are training with a team, you are training as a team. Even when you are not in front of the room, you are a trainer. Your body should be in the training room and your body language should model interest and engagement and commitment, at all times. This is not just an act – what is being said and discussed in any session is relevant as you may have to build on this in the next piece that you deliver.

Stay on message and in harmony

Trainers should be reinforcing the same key learning points and should never contradict one another in front of participants. If a serious error in content is made by one of the trainers and needs to be addressed, explore it from a point of elaboration or discussion with participants, not as a means of pointing out a mistake. It's not only bad form, but trainers directly contradicting one another creates confusion among participants, who then become more likely to lose confidence in the program overall.

Adults require respect to do their best

Just like participants, trainers working in a team need to offer each other respect in order to do their best. Keep to the time you are given to avoid other trainers having to cut content. Be supportive and constructive with other trainers; don't hesitate to offer compliments for what they do well. Communicate regularly during the program to discuss how things are going and try not to be too possessive about the pieces for which you are responsible, if another (possibly better) way emerges to approach these.

Chapter Four: Key Learning Points

1. Begin training preparation by asking fundamental questions about who the training is for, why it is needed and what the results should be.
2. Learning objectives are action statements that specify what the learner will be able to do as a result of the training program. Learning outcomes focus on how we want people to feel as a result of the training.
3. To choose training content, review what you need to achieve, then triage content according to what's essential, desirable and non-essential.
4. Commonly used formats for organizing the flow and timing of a training include session plans, affinity diagrams and mind maps, but you should use whatever best suits your own style.
5. The opening and closing of a training session are opportunities to initiate and complete the learning cycle and should be planned for as such.
6. Participants should be in charge of their own learning and actively engaging with the information at least 70% of the time; the trainer should be the only person talking or leading no more than 30% of the time.
7. Make sure you schedule enough preparation time in advance of a training to get yourself and your materials organized, to fully learn the content and to try out what you plan to deliver. It will take longer than you think.
8. When co-training, have clearly defined roles for each trainer, rehearse together and support each other at all times.

Chapter Five:
The Learning Environment

A duck walked into a store and asked the salesman if he sold grapes. The salesman said no, and the duck left.

The next day, the duck returned to the store and again asked the salesman if he sold grapes. The salesman said, "NO, we don't sell grapes." So the duck left.

The next day, the duck went back to the same store and asked the salesman if he sold grapes. The salesman yelled, "NO! WE DO NOT SELL GRAPES! IF YOU COME BACK AND ASK IF WE SELL GRAPES AGAIN, I'LL NAIL YOUR BEAK TO THE FLOOR!" The duck left.

The next day, the same duck returned to the same store and said to the salesman, "Excuse me, do you sell nails at this store?" The salesman replied, "No, we don't." So the duck said, "That's good. Do you sell grapes?"

Are you smiling after reading that story? Maybe even laughing or chuckling a bit? Possibly moaning?

Chances are you're at least in a slightly better mood than you were before you read it which means that you're actually in a more receptive state for learning. A receptive state for learning means that you're more at ease and generally more open to what experiences might come next; you've made a sub-conscious choice that you want to be where you are now.

This chapter will focus on what trainers can and should do to create the best possible environment for learning. Some of this involves the physical environment, such as seating and lighting and other similar factors; other aspects involve helping people shift to a state of mind that will make learning both easier and more enjoyable.

- **Section One: Creating a Receptive State for Learning**
- **Section Two: Managing the Physical Environment**

Section One:
Creating a Receptive State for Learning

Imagine this scenario: you're working with a political party or a civil society organization for the first time. You've worked hard to prepare your training session. On the morning the workshop will begin, you prepare the training room until the participants arrive. They seem nice enough, but what you can't see is this:

- Abu Maher is very senior in the organization. He has been doing this for years and is certain he has nothing to learn from you.
- Fatima has a problem with her mother-in law, which is weighing on her mind. She has no idea how to deal with this situation and it's a huge distraction for her.
- Ali hates trainings. He didn't enjoy school and thinks every training is like school, only even more boring.
- Zahrah loves trainings – for the free lunches. In between breaks and meals, she spends her time on Facebook or texting friends.
- Abdullah is a trainer for the organization. He's pretty sure he can deliver this content better than you can and he doesn't understand why he wasn't asked to lead the training.
- Marwa signed up for the training a couple weeks ago, but has since forgotten what it's about.
- Layla can't wait for the training to start. She loves this topic and is eager to learn more.

So, what would you do if you walked into this room to facilitate a training? Not only are you likely to be dealing with multiple levels of ability, but with a variety of attitudes as well.

Some of the distracting or more challenging mental predispositions that participants carry into the training room will have to be addressed directly (this is discussed more in chapter eight), but most will simply fade away based on how you as the trainer manage the situation.

The most important things to remember are that: 1) you can't assume that everyone in the room wants to be there when they first walk in; and, 2) the primary responsibility for shifting attitudes lies with you, the trainer.

Shifting attitudes and helping people want to be there is referred to as creating a receptive state for learning. How can you actually do this? Well, if you use the guidelines about respect and power outlined in chapter two, you'll be off to a good start. But there is even more you can do, and some of it happens before the training even begins.

Begin to create a positive impression before the training

Building positive attitudes about a training can start well in advance of the workshop itself. Send out materials to participants that are inviting and interesting, including a course description and your bio. It can be helpful to include a picture of yourself (as long as your expression doesn't make you look miserable).

Send out a questionnaire or survey to participants, asking about their experience with the topic so you have a better sense of how to gauge the training. Include some lighter questions about their personal interests to get to know them better and begin to build a relationship.

> In a training environment, you can't assume that all participants are ready or eager to be there.
>
> The primary responsibility for guiding people towards positive attitudes lies with you, the trainer.
>
> This is called creating a receptive state for learning.

You can even start to engage participants in the workshop content ahead of time. Send out a simple (or even complex, if it's appropriate) pre-assignment, asking participants to complete a task that you'll use as part of the training itself. Shannon has asked participants to do small pieces of field research, review and analyze case studies or keep a journal on a specific subject in advance of a training. This work gets participants engaged in the topic before they even walk in the training room, and can make a substantial contribution to the way the content is covered during the sessions.

Create an inviting learning environment

Imagine you are walking into a building for the first time. In the front hall, there are two doors with large glass windows so that you can see into the rooms behind the doors.

In room number 1, you see this. In room number 2, you see this.

Which room are you more likely to want to walk into? Probably room number 1, right?

As we discuss in the next section, you won't always have the ideal room in which to work and there will be aspects of the training space you won't be able to control. But you can control how inviting the room appears to participants and whether or not it's a room they actually want to walk into.

Use color to stimulate the senses from the moment participants walk in. Post bright welcome signs on the door or walls, distribute colorful pens, fiddle toys, or other materials on the tables, make name badges or table tents engaging. Essentially, to the extent that you can and that it makes sense, decorate the room for learning.

Construct bright flipchart pages or banners with the workshop topics or agenda. Use stationary and supplies (such as notebooks, folders and pens that are being given to participants) as a way to brighten the room. Choose stimulating colors for materials whenever possible.

Some trainers use music to set a tone for the training. We've done this and it can help to create a sense of interest, energy and engagement. But people can have strong feelings about what music they like and don't like so be careful not to pick something potentially controversial, and find the right volume setting – you want to stimulate the senses, not deafen them.

Build rapport

Building a relationship with participants is one of the most important ways that trainers create a receptive state for learning. While you will certainly have to establish your credentials as a trainer early on, relationships are built more quickly and effectively when your attention as a trainer is focused on learning more about the participants, rather than telling them about you.

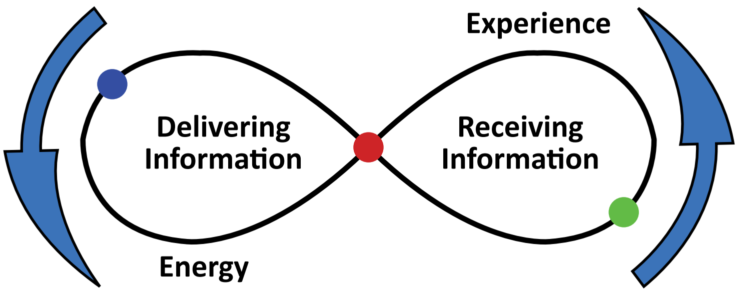
This comes from demonstrating genuine interest in who participants are and what their interests or experiences have been with the topic you're covering. Start by asking participants questions about themselves. Invite them to share their knowledge, or even their concerns about the subject, from the outset. Make it clear that you are interested in them and, after listening to their thoughts and ideas, connect the benefits of the training to what participants have said so that it's clear that the focus of the workshop will be about delivering for them.

Shannon is always impressed with Salam's exceptional skills at building rapport. By the first lunch break on the very first day of training, he will know all of the participants' names and quite a bit about each of their professional and personal lives. His interest is genuine, and the participants respond positively to this and thrive in this connection. In a recent session we delivered together on training skills, participants were asked to come up with examples of strong interpersonal intelligence – the ability to relate to and understand other people. Their list was short: Salam and the Buddha.

Keep up the energy

Meredith Monk is an innovative composer and musician who describes the relationship between the performers and the audience during an artistic performance as similar to a figure 8.[16] Energy, emotion and ideas move in a constant flow, back and forth, pushing and pulling.

This is the same idea that we introduced in chapter one.



In this scenario, the trainer is the conductor – the person tasked with keeping the energy, experience and ideas moving along the figure 8 and ensuring that there is constant motion, flow, momentum, push and pull.

This means that as a trainer, as a creator and a source of this momentum, you have to

16 http://www.onbeing.org/program/meredith-monks-voice/1398, accessed July 2014.

keep your own energy high. Take care of yourself, get enough sleep, get the nutrition you need for sustained engagement, and leave any other worries or stresses you may have in your life outside of the training room. At times, there will be plenty of energy in the room but sometimes it will all have to come from you. This is the coaching or motivational aspect of training, and it can be crucial to helping participants create and maintain a receptive state for learning.

Section Two:
Managing the Physical Environment

There are many training manuals that provide a catalogue of options for training room set up, with configurations for boardroom style, theatre style, U-shape, cabaret, fishbone, and many more exotic designs.

This is not one of those manuals.

Basically, when we walk into a training room, it's usually a matter of making the best out of whatever we've got. There is often some major structural or logistical challenge: pillars in the middle of the room blocking most people's view, chairs that are falling apart, particularly fragrant toilets in close proximity, climates that are too hot or too cold, and/or a massive wedding being set up in the room next door with loud hammering and disruptive deliveries. We've had cats and birds moving around the room, had to train by candlelight when there was no electricity, abandoned training rooms for security alerts, and endured coffee that is an affront to taste buds everywhere.

So, when we read manuals about the perfect way to set up a room, we chuckle a little bit. These are luxuries that not every trainer gets.

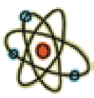
With these realities in mind, here are our basic guidelines of principles not to be ignored, no matter the circumstances.

Set up the room for inclusion

Even though there may be large pillars in the middle of the room or only a narrow space with which to work, do everything you can to ensure that everyone in the room can be included in the training. This typically means finding a seating arrangement where everyone can see what's going on – even in the very back – and where all participants are somewhere in the trainer's sightline, so that they have equal chances to be seen, to ask questions, or to make a comment.

Whatever configuration of tables and chairs you use, check out the room from the perspective of the participants. What would it look like and feel like to you if you were sitting in this room as a learner?

Set up the room for movement and energy

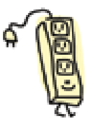


Participants should be able to move during exercises and breaks. Even a brief transition from a U-shaped plenary table on one side of the room to smaller round tables for group work can create a change in perspective, and stimulate a bit more blood flow to the brain.

To the extent that you can, configure the room so that there is some space for participants to move around or shift to a different area when there is a change in session or when a new training tool is being used. Clearly you'll have to work these movements into your training timing, but there is no need to create vast journeys. Even something as simple as switching seats from one side of the room to the other in the afternoon session can help.

If there is a staff or team table – people taking notes on laptops or moving in and out of the room to deal with logistics – keep it out of the line of sight of participants. Staff are usually focused on different tasks than participants and so their behaviors and movements are different. Staff movements can be distracting and so it is best to place a staff table in a low-key and discreet corner or somewhere near the door for quiet exits and reentry.

Innovate, but have a back-up plan



Maybe you'll have electricity. Maybe the data show projector will work perfectly. Maybe there won't be any problems with your Power Point presentation or the videos you want to use. Maybe you'll have a sustained internet connection and the download speeds you need.

Or maybe. . .

Don't be afraid to try new things, but be aware that – particularly when you are working in an unfamiliar environment – plenty can go wrong. If you are trying something that requires a reliable infrastructure, always have a back-up plan in case the electricity, internet, water, or whatever just isn't working that day.

And never forget the golden rule in training: there can never be enough flipchart paper. Flipchart paper will never stop working simply because the power has gone out.

An editorial note from Shannon: Consider the role of chemicals

Chemicals are something that every training accommodates. Stopping for breaks isn't always about refreshing the mind, but also about feeding nicotine and caffeine cravings. These have an impact on the mood and mind state of participants (and trainers – my own coffee addiction is legendary) and largely need to be accommodated to keep people content and happy.

However, there's another chemical that has an impact on the learning state of participants: sugar. Foods heavy with sugar can provide an energy boost, but this is quickly followed by an energy crash of the same magnitude. (Living proof of Newton's third law of physics: for every action there is an equal and opposite reaction). Unless you're teaching participants how to run a marathon, they're unlikely to need that level of a boost during your training and they certainly don't need the crash.

Consider getting foods with refined sugars off the menu, especially during coffee breaks. I have been experimenting with offering savory snacks and foods with natural sugars that have a less dramatic effect on the body – fresh fruit, dried fruits, nuts, vegetables, dips, crackers, mini-pizzas, little sandwiches, etc. – and have even replaced my trademark bags of chocolate (which I used as incentives during afternoon sessions) with small toys and other treats. It seems to be making a difference. Energy levels among participants appear more steady and consistent, even in the afternoon "zombie zone!"

Chapter Five: Key Learning Points

1. Not all participants will enter the training room ready and willing to engage or learn. A trainer's first job is to help create a receptive state for learning.
2. If possible, try to create a positive impression and begin to build a relationship with participants before the training even begins.
3. Create an inviting learning environment in the training room itself and set up the physical space for inclusion, participation, and movement.

Chapter Six: How to Design and Use Training Tools

In chapters two and three, we talked about the importance of using a diverse range of training approaches and keeping the learning environment multi-sensory so that you're engaging participants in a variety of ways. The purpose of this chapter is to provide more information on some of the training tools at your disposal in order to do this.

It will also provide an overview of what communication can look like in a training setting, and how to ensure you're engaging all aspects of communicating, particularly when working in translation.

- **Section One: Communication in a Learning Environment**
- **Section Two: Training Methods and Techniques**
- **Section Three: Using Visual Aids**
- **Section Four: Tips for Effective Facilitation**
- **Section Five: How to Use Feedback**

Section One: Communication in a Learning Environment

Do you want to know how to shut down participants' energy, kill their mood, and disconnect them from engagement? Very easy! Below are some great ideas:

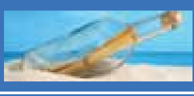
- Keep lecturing
- Don't show respect for the participants
- Talk in a monotone voice
- Deal with participants as if they were primary school students
- Be biased or closed towards an idea or a different way of thinking

- Be unprepared for the session
- Avoid exercises and games
- Neglect all participant interventions, comments, and notes
- Believe that illustrations and visual images are only for luxury and not really essential

With a few of the above ideas and actions you will definitely have the most boring training session ever. You might even gain the privilege of ruining the training business altogether!

Clearly the section above was meant in jest. The list above provides some great advice on how to drive a training session off a cliff. So, how do you make it fly instead?

Remember that conducting a training is a communication process. The key to effective communication is being aware of all of the elements involved.

Sender 	The person who is sending the message. It might be the trainer in this scenario when they are presenting and it might be one of the participants. Is he clear about what he is saying? How is his tone of voice and his gestures? Is he prepared and assured in what he is trying to convey?
Receiver 	The person who is receiving the message. Is she ready to listen? Does she know how to listen? How is her mood? What is her level of engagement? What kind of relationship exists between the trainer and the participants? Where is the power and what is the group dynamic? Are participants angry? Happy? Sad? Hungry? Sleepy? What are their expectations?
Message 	The idea sent from sender to receiver. This might be verbal and it might be non-verbal. Is there harmony between words, visual images, sounds, and body language?
Environment 	The atmosphere where the communication process (training, in our case) is happening. Is the training hall big enough or small enough for the participants? Is the room layout comfortable? The seats? The cooling and heating system? The lighting? Are the translation and/or sound systems facilitating understanding?
Feedback 	Feedback is the phase of communication when the receiver gets to respond, essentially closing the circle of communication. Feedback may be verbal, written or it may be delivered through body language. It is important that the sender actively seeks feedback to make sure that the message has been clearly understood and received in the way that was intended.

These elements illustrate that effective communication in a training situation is not only about the trainer but also about the overall environment, the state of mind and level of motivation among participants, the various means that are used to deliver a message and, importantly, the feedback or response provided by the receiver.

So, it is not just about the words we say. As trainers, we often think that what we say to make ourselves clear and deliver our message to the participants is the most important part of our role. Well, words are very important yet there are others ways to deliver messages without using words. In fact, with some of these other ways, we can alter the meaning of the words themselves! This can be explained further by exploring the core elements of verbal and non-verbal communication.

Verbal Communication

Verbal communication is the delivery of the spoken word. Language, words, phrases, verbal expressions are all a vital part of human interaction.

There are two main types of communication in a training environment.

Verbal Communication
Non-Verbal Communication

But just saying something does not guarantee it will be fully taken in or understood by the receiver. There is a lot of nuance around how the spoken word can be used most effectively in a learning environment, including the importance of the choice of language and how it's delivered. We've summarized some of the main points below, those which we have found most valuable.

✓ **Chose language that participants can easily understand**

This not about local language vs. foreign language; it means choosing words and phrases that are accessible and understood by participants without much effort. If your language is too academic or unclear or if you talk in a sophisticated way using big words that are not used every day by participants, you are not impressing them – you are confusing them.

As an example, let's pretend you want to buy a new truck. Two salespeople approach you to try to sell you a Toyota Hilux. The first tells you that it's a "highly flexible and versatile machine with a Multi Information Display panel, Optitron Combimeter, and optional Vehicle Stability Control." The second salesperson tells you that it's a "reliable workhorse that will perform hard tasks and never break down." From which salesperson are you more likely to buy and why? We would guess the second because you'd have a better understanding of what you were spending your hard-earned money on.

✓ Use descriptive language and comparison

While your words should be clear and simple, you should also pull in language that allows you to verbally draw a clear picture for your participants. A vocabulary rich in descriptive words can help with this. So can analogy and simile. What can you compare your subject matter to that is familiar and easily understandable to participants?

Salam frequently makes learning connections with situations in movies his participants are likely to have seen. Shannon likes to tell stories with characters facing similar circumstances to the learning points that are being made. Any use of language that will help participants visualize the point you are trying to make will make your spoken words stronger and more meaningful.

✓ Use language to grab and hold attention

The spoken word has its limitations, but it is an excellent medium through which to grab and hold attention. Tell a story or a joke. Ask questions or initiate a provocative discussion to get ideas and blood flowing. Introduce new information or breaking research about the topic you're discussing. Use language to engage and challenge participants to define the issue or the learning points themselves.

✓ Avoid repeating one word or phrase

We've all been in an audience when a speaker or presenter is constantly repeating the same word or phrase over and over, such as "like", "you know", "OK", "I mean" or even "umm." It's frustrating, right?

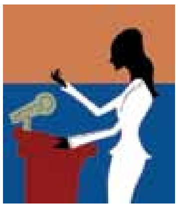
Remember the discussion in chapter three about the term "paying attention" being a direct metaphor for how the brain works? Well, if a speaker (or trainer) is constantly repeating the same word or sound over and over, the "attention coins" that the participants can access are spent more quickly and they are more likely to lose interest or energy more quickly. This probably reflects your own experience when you've witnessed a speaker doing this.

Many people use this type of repetition as a place holder, as a moment to catch our breath and think through what we are going to say or do next. We don't mean to do this and we don't always know we are doing it. However, it is taxing on a participant audience.

If you haven't done so before, ask a colleague to record you giving a genuine training (not a practice session). Use this as an opportunity to learn more about your own delivery style and the words or gestures (discussed below) you may repeat without realizing. Ask a trusted colleague to watch you and offer some feedback. Repetition may not be an issue for you, but it would be good to know if it is.

Non-Verbal Communication

If verbal communication is the use of the spoken word, non-verbal communication is essentially everything else. It is the use of facial expressions, eye contact, how we stand and walk, what we do with our hands, how we sit, how we smile, how we gesture to participants, the tone of voice we use, and even our physical appearance such as the clothes we wear and our cleanliness.



There are a lot of factors here, and non-verbal communication can create quite a bit of chatter in the training room without using a single word. We send messages about ourselves, our opinions and positions and our mood through our non-verbal communication. There is even research that indicates that in some situations, non-verbal communication is more influential than the actual words we use.[17]

The key question is whether our non-verbal communication fits the training environment, the type of participants we have, the topics being discussed and, critically, the message we are trying to convey. When, for example, a trainer is not looking in the eyes of a participant who is speaking and instead is focusing on papers or a laptop or glancing at a watch, without uttering a word the trainer is saying, "I am not totally listening to you." Even if the trainer is very skilled at multi-tasking, he is still communicating a lack of interest with his body language. Contrast this scenario with another one when the participant is talking and the trainer grabs a chair, sits on it, leans his body forward toward the speaker and looks at the speaker's eyes nodding his head up and down. Which trainer will deliver the message of a good listener and more respectful trainer?

17 See, for example, the work of Albert Mehrabian's Silent Messages (1971), which indicates in situations where a speaker is trying to persuade an audience, non-verbal factors will have a greater influence than the spoken word.

Facial expressions and eye contact make a difference in a trainer's ability to communicate effectively with participants, particularly when working in translation. They serve as key validators of the words you are speaking, and start to send messages and other information to participants before they even hear your words through the translator. Tone and intonation can have an impact as well, even in translation. Consider the example below. How would you read the next sentence aloud?

Be Careful.

Now, read the next sentence aloud.

BE CAREFUL!

Try this next one.

Whether you read it aloud or silently to yourself, did you find that the message got louder and more emphatic from the first to the last scenario? Tone of voice is a great example of how, even when the exact words you are speaking don't change, how you say them can make a significant difference in how they are perceived and received by an audience.

So, the words you speak as a trainer are important but it is vital to be aware that you are communicating as a whole package and not just with what's coming out of your mouth. Combine the best choice of words with the appropriate tone, sound or intonation, body posture, facial expression, eye contact and hand gestures to ensure you are delivering the message as intended.

Section Two:
Training Methods and Techniques

The trainer is not a teacher and, the trainer is certainly not a preacher. This is why the trainer should have different techniques to facilitate knowledge transfer, moderate the experience, balance energy and present the session. On the following pages are some frequently used training techniques:

Lecture	
What it is: Considered to be one of the most traditional techniques, it involves presenting an idea largely through one-way verbal communication dominated by the lecturer.	**When to use it:** ✓ To present a new idea ✓ To present facts ✓ To talk about theoretical issues ✓ To give instruction or provide a base of information ✓ When the time is short ✓ When there is a large number of participants
Advantages: • It can be an efficient way to deliver information • If you need to do it, keep it short	**Disadvantages and Challenges:** • The burden is only on the trainer • There is no skills development for participants • The participants are passive listeners only; there is no participation

Dialogue and Discussion	
What it is: The trainer uses questions as a means to engage and encourage participants to share their knowledge and experience and initiate a discussion. With thoughtful and well-designed questions the responses will help to sculpt the final idea. Here the trainer is really the maestro of the participants' instruments and tunes them to play a unique symphony.	**When to use it:** ✓ To start a conversation about a new idea ✓ After the exploration of a new topic, skill or idea to help complete the learning cycle ✓ To guide the group towards a general agreement or to reach a conclusion about an issue ✓ If there are different ideas in the room about an issue ✓ To find out more about the participants' level of knowledge and experience
Advantages: • Dialogue and discussion are a great way of creating participation and can help keep participants engaged and energy levels up • These can be very helpful to participants who need to talk things through to complete the learning cycle	**Disadvantages and Challenges:** • This approach can take a lot of time • Requires the trainer to have a high level of facilitation skills • Questions and interventions can sometimes take the session off-track

Case Studies	
What it is: Case studies are used to present a problem or an issue to participants and a challenge for participants to study, analyze, come up with solutions, and then discuss the lessons learned. So instead of going directly to resolving a problem that the participants face in reality, we provide a similar case in another context and then link it back to the participants' experience.	**When to use it:** ✓ When dealing with complicated issues ✓ When participants are not comfortable dealing with their own issue directly ✓ When participants are coming from diverse backgrounds, to get them all focused on the same issue ✓ When we want to show that there are others who have experienced something similar and we want to assess how they dealt with it ✓ When we want to enhance the participants' analytic ability, critical thinking and problem solving skills
Advantages: • If participants are dealing with complex, controversial or divisive issues, a case study can be an excellent way of helping them explore these without creating personal discomfort • Case studies can engender creative problem solving and the ability to see a situation differently	**Disadvantages and Challenges:** • Best used in smaller groups Typically require a lot of time to absorb the information in the case study and figure out how to work with it • Participants might not be fully engaged because they think it is not a real case • Participants may struggle to relate to the solutions and lessons learned if they can't empathize with the case study

Working Groups or Teams	
What it is: The trainer divides the participants into groups and gives them a task to do that is designed to further explore a concept or idea, or to solve a particular problem.	**When to use it:** ✓ When there is a large number of participants, to create an opportunity for everyone to participate ✓ When there is a need to consider different perspectives on one issue ✓ When there is a lot to be discussed in a short period of time ✓ When there is a need to provide a comfort zone for shy or quiet participants to express themselves in smaller groups ✓ When creativity and initiative are important to the learning process
Advantages: • Provides participants with the chance to work independently and for individuals to take leadership • Smaller groups can allow participants to explore issues in more depth and approach them in their own way	**Disadvantages and Challenges:** • It is more difficult for the trainer to know what is going on in all the groups at once, so it is harder to facilitate group dynamics • Strong personalities can dominate more in a smaller group • Can be time consuming getting feedback from each group on the results of the task they were asked to complete

Brainstorming / Brain Blossoming	
What it is: Brainstorming is when a group works collectively to come up with many ideas in a short period of time, usually by simply shouting them out as they arrive and recording them on flipchart paper or other means. No ideas are judged and none can be rejected outright. However, research suggests that this approach actually inhibits creativity as participants typically restrain themselves from speaking out until they are reassured that their ideas will be socially acceptable to the group, or they only make suggestions that would conform to what the majority of the group indicates would be acceptable. The recommended alternative to brainstorming is sometimes referred to as "Brain Blossoming." In this approach, participants are asked to work on their own first as individuals by, for example, simply writing their ideas down on a piece of paper before submitting them for group discussion. Working independently first is intended as a means to prevent "group think" from inhibiting creativity.	**When to use it:** ✓ When there is a need to generate new ideas ✓ When there is a need to consider a range of potential solutions ✓ When it is important to engage all participants in discussion ✓ When there is a desire to enhance creative thinking ✓ When a group needs to create or problem solve collectively
Advantages: • Provides an opportunity for participants to explore their creativity without fear of judgment	**Disadvantages and Challenges:** • The trainer must exhibit the non-judgmental stance that is expected of participants at all times during this process • Some participants might not have a lot to add during a session like this, so we must be careful not to embarrass them

Role Play	
What it is: The trainer designs a scenario for some or all participants to play a role in a specific issue. For example, in a training on election observation the trainer can set up a room as if it were a polling station and give some roles for participants to play – the polling station manager, electoral workers, security, voter, etc. The trainer might then create different scenarios within the role play – voters make some mistakes or the polling center manager attempts fraud, for example. Then there will be discussions on the process, what went well and what went wrong and the lessons learned.	**When to use it:** ✓ When there are important practical or technical skills to be learned or enhanced ✓ When it is necessary to look at a situation from multiple perspectives, or to understand the feelings, values, skills and responsibilities of each character in a situation ✓ When it is important to explore new attitudes and behaviors ✓ When a trainer wants to have the full attention, engagement and attendance of participants ✓ Role play can be high energy and therefore very useful in the afternoon or after lunch!
Advantages: • Instead of lecturing on the topic or showing it in a video, enacting the situation in a practical setting can provide participants with a deeper understanding because they have "lived the experience" • Can enhance the learning process	**Disadvantages and Challenges:** • People who don't like role play, REALLY don't like role play and shouldn't be forced into it • Some participants might feel defensive while receiving feedback because it's a very personal form of learning • If participants are nervous or uncertain they want to do it, they may not take it seriously and it can either be a complete flop or a comedy circus

Demonstration	
What it is: The trainer shows the participants how to perform a specific task step by step and then the participants repeat those steps on their own.	**When to use it:** ✓ When exercises or tasks require practical steps ✓ When the task is completely new, complex, or if it could be dangerous if implemented incorrectly ✓ When a trainer wants to demonstrate the best model for a specific function ✓ When it is to show how to work on a specific device ✓ When there is a large group that needs the practical information ✓ To add some fun to what could otherwise be just a lecture!
Advantages: • Makes participants more comfortable with the challenge of trying something new since they've seen it demonstrated • Can add fun and interest to a training session	**Disadvantages and Challenges:** • Participants will frequently seek to mimic the trainer's actions rather than figuring out the task for themselves or learning from their own mistakes, potentially diminishing the type of learning that comes from solving problems on your own

Homework / Independent Work	
What it is: The trainer assigns tasks to participants to work on when the training session is over. Sometimes the homework is given before the training starts in order to discuss it during the training sessions.	**When to use it:** ✓ When there is a need for independent individual or group work ✓ When there is not enough time during standard training hours ✓ When the task needs off-site research ✓ When there is a need to expose the participants to a topic before a session ✓ When there is a need to create individual or group responsibility for completing tasks or taking on challenges related to the course
Advantages: • Creates opportunities for those participants who prefer independent learning	**Disadvantages and Challenges:** • If it is a group work situation, the participants may depend on only one or two to do the homework • Some participants may not take the homework seriously because there is no one monitoring them • The participants develop fast solutions without taking the time to think, discuss and prepare homework answers • It is vital that time is created to review and incorporate the results of independent work, so that it has value in the learning process and is not just perceived by participants as busy work

Icebreakers	
What it is: Icebreakers are activities designed to refresh the overall environment, increase participants' attention and engagement, and introduce a degree of physical movement and/or fun. Icebreakers can be any activity that achieves these objectives, but we usually recommend using something that can be linked to the training topic or to the learning points you are making in the training. Ice breakers that are linked to learning tend to be more valued by participants, and can still be a lot of fun. For example, when we're training on communication, we sometimes divide participants into teams, have them create a fictional aerospace company and construct a model aircraft using flipchart paper. The learning points are about how well they communicate with their customers (we draw a parallel to voters here), but they have a lot of fun flying and crashing paper airplanes together. For an icebreaker that is not related to a topic, Salam will give each participant a balloon and ask them to blow air in it until it explodes. The first winner gets a candy bar. This can really get the energy in the room up!	**When to use it:** ✓ In the beginning of the first day of the training. ✓ Before starting new sessions ✓ When the mood is down – participants are tired, weary or there has been some disagreement ✓ When the participants are off-track ✓ After lunch ✓ When there is negative energy in the training room ✓ When we need to build or strengthen relationships among participants
Advantages: • Helps get energy levels up and facilitates building relationships among participants	**Disadvantages and Challenges:** • Can be distracting for some participants • Can take time implementing the icebreaker and then refocusing participants on the agenda

From these techniques, it is important to state that there is no "best way." The trainer should select the technique depending on several factors:

- The needs of participants, their previous exposure to the topic and their relationships with each other
- The topic, learning objectives and learning outcomes
- The length of time available
- The training room suitability and overall environment
- The budget and other available resources
- The session time – e.g., morning, after lunch (aka, the "zombie zone"), evening, etc.
- The trainer's ability and experience

Designing and Selecting Techniques

Once you decide which techniques will work best, how do you go about finding the best way to integrate them into your session? There are quite a few resources available with tried and tested training techniques, many of them free. There are websites like MindTools.com, and quite a few online training guides from organizations similar to NDI that offer catalogues of training techniques, including icebreakers, exercises, simulations, etc.

These resources can be very useful, but it's rare that they will offer something you can use verbatim. Most of the time, you'll find you'll have to modify at least a few bits to make the approach fit well for your participants and your particular topic.

So why not come up with your own approach? Here's a simple step-by-step guide to coming up with your own exercises.

1. Review the topic, the learning objectives and the learning outcomes.
2. Identify the Knowledge, Skills and Attitudes (KSA) associated with the above.
3. Connect these to the agenda and divide them up: at what point in the agenda will you be focusing on each of these?
4. Take each KSA one at a time. What type of experience or engagement would best help participants connect with each of these?
5. Convert that experience or engagement into an exercise. In other words, prepare a scenario (case study, role play, working group task, etc.) that will allow participants to implement the skills needed. Try to make it creative, be sure it suits the participants, and have clear steps to implement it within the determined time frame.

6. Think through the tools and materials you will need to implement this exercise and gather these.
7. Test it (including the space, materials, relevance to the topic, etc.) to make sure the results connect with the intended learning point. Time it out to makes sure it fits with the agenda.

Here's an example: In a public speaking session, you want to improve participants' knowledge of the principles of good communication, build their skills as speech writers, and increase their confidence (attitude) in facing an audience. So, after reviewing each of these elements in the training session, you ask each participant to prepare a short speech, practice privately in front of a mirror, and then deliver it to their peers. Once they deliver their speech, they receive feedback from both the trainers and their peers based on the principles outlined in the training.

Keep in mind:

- Try not to throw too many learning points into one exercise. It's usually best to focus on one objective or outcome at a time.
- Prepare yourself well. Make sure you have all the tools and materials you need, and that the role you will play in the exercise is clear to everyone.
- Make sure your instructions are clear and that you repeat them several times. Participants often need to hear the instructions or guidelines more than once, particularly when they are facing a challenging task. It's not that they're not listening, it's just that they're processing a lot of information at the same time.
- Be prepared for unexpected events. Participants may respond to an exercise or challenge in a way that you could not possibly have anticipated.
- Encourage participation, but don't impose it!
- Don't forget the learning cycle. Make sure you close (set down) the exercise with a discussion of what happened and what people took from it.

And remember, it is always better to include a variety of techniques in order to accommodate multiple learning styles and to keep the environment as stimulating as possible. This is a chance for you to set your creativity free!

Section Three: Using Visual Aids

Visual images are vital components of an effective learning experience. They can make a significant difference in keeping participants engaged, in creating learning with understanding, and in forming a vibrant and inviting environment.

But, before we go any further with our discussion on visual aids, we need to talk about PowerPoint, Prezi, Slide Rocket, Keynote, and other electronic presentation formats and how they are commonly used.

Electronic presentations are a form of visual aid and can be very helpful in a learning environment, especially when the trainer is not speaking the same language as the participants. The projected images and translated words can help reinforce the points the trainer is making, layering information to make it even more accessible, and delivering visual images that help participants connect to the learning content.

However, these presentations are not – and should never be – the trainer's speaking notes on a screen.

Far too often, electronic presentations are crowded, confusing and incomprehensible. Presenters seem determined to shove as much information as they possibly can onto every slide. At this point, they are no longer a learning aid, but really just the speaker's notes projected for everyone to see.

Electronic presentations should be used as the visual tool that they are. Every slide should contain some form of image – a photograph, clip art, a chart or graph, an illustration, the occasional gif – that backs up or reinforces the point the trainer is endeavoring to make. In most cases, these images will be more valuable as vehicles to learning than the written word that accompanies them.

For example, if we've never seen a sunflower before and you describe it to us in written words on a screen, we might get a sense of what you're saying. But show us a picture, backed up by words of explanation, and we really get it. This is the value that electronic presentations bring to training.

Therefore, words should be kept simple and short, a basic summary of the key points. Keep bullet points limited to 4 per slide (6 at the very most). Use darker, vibrant colors on a white background to ensure the words can be read in any lighting. Lighter colors such as yellow, light green, pink and even orange often won't show up well enough on a screen.

We would also caution against using too much animation. Unless it's helpful to the point you are trying to make, it's more distracting than it is valuable. The possible exception is when it's used to reveal one portion of a slide at a time, or one piece of information at a time and showing how these are connected.

That's our diatribe on PowerPoint. Now, on to other visual aids!

- **Photographs and Pictures:** These can be very useful as a means to introduce a new topic or to help participants visualize a skill or concept you have been trying to explain. Recall again the ease of understanding that comes with seeing a photograph of a sunflower in contrast with only hearing it explained verbally.

- **Video:** Video can be as valuable as photographs and pictures, in some cases even more so. We use a political party's canvassing training video to work with party activists on door-to-door canvassing. But video doesn't have to be limited to showing how something is done. Salam often takes clips of popular films and shows them as a means to begin a discussion about a controversial or interesting issue tied to the training. Shannon shows advertisements from issue-based campaigns as case studies on how advocacy can be conducted and messages constructed. Videos can also be used to set up scenarios for exercises, such as offering a briefing on a complex situation as a lead into an activity on negotiation or strategic planning. There's no end to how video can be used as a training tool – create your own or use what's already out there (as long as you have the required permissions to do so if it's protected in some way).

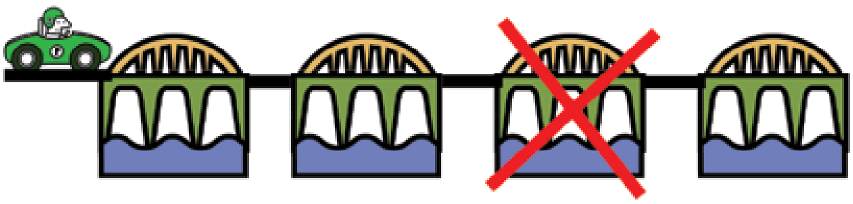
- **Cartoons, Drawings and Illustrations:** These can be fun tools to add humor to a topic or to help contrast "what to do" with "what not to do" when describing a new skill. If you are a skilled artist, these types of images can make a real and enjoyable contribution to "knowledge visualization".[18]

- **Flipcharts and Whiteboards:** A movement has emerged in recent years among trainers specialized in work-based learning in support of a return to the flipchart over the use of technology. This classic training tool accommodates both pre-prepared illustrations and live imaging of a discussion or concept. They are also equally accessible to trainers and participants alike and offer a medium for participants to come up with their own illustrations and ideas.

- **Charts and Graphs:** Charts and graphs remain the best way to convey statistical information. They help participants put words and figures into context and create an image that facilitates memory and understanding.

  More recently, this type of visual representation of data has taken the form of infographics or dataviz, which convert lengthy or bulky (or otherwise boring) statistical information into an engaging visual image that tells a story. These can be very powerful tools for facilitating understanding, but it's no simple task to create them.

  If you have superior designing skills, you might try to pull off a good infographic for your training, but luckily even something basic will make a difference. For example, in a session on policy development, we might construct the following problem statement: one in every four bridges in the country is unsafe and needs immediate repair. Does the same statistic look and feel differently if it's illustrated as below?



18 This is a term used by Royal Society for the Encouragement of the Arts to describe their innovative program (RSA Animate) to illustrate lectures on important topics using a form of cartooning. Learn more at the RSA website http://www.thersa.org/events/rsaanimate or view an example of Daniel Pink's lecture on motivation at https://www.youtube.com/watch?v=u6XAPnuFjJc. We would love to be able to draw like this!

Section Four:
Tips for Effective Facilitation

One of the most essential skills for a good trainer is to be a good facilitator. You may recall the definition from chapter one that a facilitator literally means "a person who makes things easier."

A facilitator is someone who serves as a guide to a group, offering direction and support but without taking over. Facilitators help others become aware of their own abilities and encourage them to take leadership and to take calculated risks. Facilitators aid participants in their journeys to learning, personal growth and skills development.

Facilitators are not directive or dictatorial; they provide ideas and options but don't tell people what to think. This is the role of the "maestro" which has been invoked at times in this manual. Facilitation can play such a key role that some schools of thought on adult learning have abandoned the word "trainer" altogether and instead solely use the term facilitator.

So how does effective facilitation work? Chapter one (section four) offers a good starting point, and the list below offers some action points that trainers can take to hone their facilitation skills.

- **Master the topic.** A good facilitator does not simply show up at a session with a bunch of questions and read through them to get answers from each participant until the session ends. A good facilitator knows the topic well, can help guide conversations when things are going off-track, and can course-correct if information is inaccurate or misleading.

- **Establish rapport with all.** You must have the attitude that you like all of the participants and you want to build friendship bridges with each of them. You can do this with positive body language, by selecting the right words and sentences, preparing well-designed questions, and taking the time to prepare for the session. [19]

- **Be neutral.** Let all ideas and interventions flow in the training room. Give opportunities for all participants to express themselves irrespective of your own opinion. Avoid personalizing discussions.

19 For more information and examples on this point, read Horizons with no Limits, Mohammad Al Tikriti.

- **Be fair.** Don't favor a person who may have ideas that appeal to you. A good facilitator is objective and gives the room to all participants. Give the same time and opportunities to all to participate and avoid letting a few people dominate discussions. If you fail to do this, you will lose part of your audience.

- **Be a good listener.** We don't mean only to use listening techniques; we mean literally to hear from your heart and mind. Neglect everything external and internal that might prevent you from listening to a participant.

- **Stay focused.** When you have a room full of participants with different information, different levels of knowledge and diverse experience backgrounds, there is a lot that can take discussions off the main course. It is important to understand which waves to follow, but as a maestro you need always to get the ship back to the main course and stick with the original path in a polite way.

- **No judging.** A facilitator is not a judge to sentence punishments to participants. It is not his duty to judge ideas or score them. One of the big mistakes a facilitator can make is to do a fast scan of the participants, frame them in pre-designed personalities, and deal with them according to these first impressions. Take it easy and give people time to show themselves.

- **Be tolerant, with no, one answer.** A lot of ideas will be flying around, a lot of questions will be asked, a lot of concerns will be there in the training room. You are not obligated to have the answers for all of this. Some answers might come from participants and some will need more research and digging after the session. You are there because you know some aspects of a topic like others in the room, but no one knows it all!

- **Embrace each comment.** All participants' interventions and comments should be taken seriously and you need to express that with good listening, positive praise, documentation on a flipchart, or handing over the topic to the room to be discussed if needed.

Section Five: How to Use Feedback

Have you noticed how many times in this manual we have used circular shapes to describe the manner in which information, energy, and learning move in a training environment? Communication connected to learning is never one-way, flat or broken – it must always flow forward and then back to close the circle, cycle or figure 8, to complete the learning process.

One of the mechanisms frequently used in training to complete this cycle is feedback. In electronics, feedback is when the effect of something is returned, when the output flows back to the input. In a training environment, feedback takes place when participants are given information or an assessment of how they completed a task or challenge, or when participants share with the trainer or each other their response to a certain experience.

Feedback is a vital part of the communication and learning processes. It can aid or it can badly damage or even completely shut down both of these progressions and inhibit participants from taking the kind of personal risks that are vital to both learning and personal development.

In her book, *Daring Greatly*,[20] US researcher Brené Brown provides useful guidance for anyone giving feedback.

"I know I am ready to give feedback when:

- ✓ I'm ready to sit next to you rather than across from you.
- ✓ I'm willing to put the problem in front of us rather than between us (or sliding it toward you).
- ✓ I'm ready to ask questions, and accept that I may not fully understand the issue.
- ✓ I want to acknowledge what you do well instead of picking apart your mistakes.
- ✓ I recognize your strengths and how you can use them to address your challenges.
- ✓ I can hold you accountable without shaming or blaming you.
- ✓ I'm willing to own my part.
- ✓ I can genuinely thank you for your efforts rather than criticize you for your failings.
- ✓ I can talk about how resolving these challenges will lead to your growth and opportunity.
- ✓ I can model the vulnerability and openness that I expect to see from you."[21]

This list is written within the context of relationships that are more enduring than those that trainers are generally able to develop with participants over the length

20 Brown, Brené; Daring Greatly: How the Courage to be Vulnerable Transforms the Way We Live, Love, Parent and Lead, (Gotham, 2012).
21 A downloadable poster of this list can be found at http://brenebrown.com/wp-content/uploads/2013/09/DaringGreatly-EngagedFeedback-8x10.pdf; accessed August 2014.

of a workshop, but the principles are highly transferable. Trainers should not see themselves as the authority whose role it is to highlight and criticize the weaknesses or errors of those endeavoring to learn. Rather, their role is to engage in a supportive relationship with participants that recognizes that we are all learning, that we have something to offer each other, and that no one in the room is infallible.

How can we put these principles into practice? We offer a set of guidelines below that can be helpful when giving feedback to participants:

- **Establish guidelines and ground rules.** If you are going to give feedback to participants on their ability to accomplish a specific task or complete a challenge, it should be very clear (in advance) what aspect of their work will be assessed, and where and how they will receive evaluation or feedback. It is neither fair nor effective to critique peoples' work arbitrarily. Additionally, if other participants are going to be asked to provide feedback to each other, it should be crystal clear (in advance) how supportive and constructive feedback is given and any comments outside of these boundaries should be prohibited. (When there is the impression that a team or individual task is a competition, it can bring out the worst in some participants, making their participation in the feedback process more harmful than helpful.)

- **Ask questions to clarify.** If an individual or team's work is really off or they have badly missed what the results could have been, ask questions before offering feedback. Most of the time, you will find that the task was misunderstood, they didn't fully grasp the objectives, or there was some error in communication that created a wrong impression. It's better to clarify this before providing feedback that could be more severe than is warranted.

- **Be sincere and specific.** When it comes to facilitating participants' personal development (which is what feedback is supposed to help do), neither false praise nor vicious criticism are helpful. Be sincere and clear about where both strengths and weaknesses lie. Neither requires being rude or superficial. Find diplomatic language to suggest how participants can correct facts or ideas that may be misunderstood, or how they can learn more about a concept with which they are clearly struggling.

- **Don't let it get personal.** Feedback should always be about the performance, the work product or the choices made by individuals or teams – it is never a personal attack on the people themselves. Don't ever personalize the intervention even with body language, getting too close to the participant presenting as if it is only between the two of you. NEVER shame or judge.

- **Seek solutions.** In feedback we want to learn. Feedback should not only identify strengths and weaknesses, but offer guidance on how to build on strengths and transform weaknesses.

- **Recognize strengths.** There are always strengths. Always. Don't leave them behind; they are an important part of individual growth and development.

- **Stay supportive.** The trainer should give feedback from the perspective of a facilitator – someone who is there to make the journey of others easier. Use language and an approach that is sincere and supportive.

- **Be ready to receive feedback yourself.** As the character Miracle Max says sarcastically in the movie *The Princess Bride* when someone tells him how to do his job, "Woo-hoo-hoo, look who knows so much!" As the trainer, you are a source of information and learning, but you're not the only one and you're not infallible. This is a learning experience for you as well (isn't all of life?) and you should demonstrate the ability to receive feedback by inviting it at appropriate times during the training and being open to the suggestions and critiques that will very naturally come from participants throughout the process.

Remember that in a learning environment, you are inviting and asking people to take risks. The reward for taking these risks is personal growth and development, and possibly professional advancement as well. If they are going to do this, they are going to have to trust you. Feedback should always be about building on that trust, rather than putting it in jeopardy.

Chapter Six: Key Learning Points

1. Effective communication is at the core of good training.
2. Use language that is accessible to participants. Be aware of what messages you are sending through your body language and other means of non-verbal communication.
3. Chose training methods and activities that are a good match for the topic, the participants and the training environment.
4. Use visual aids to enhance the learning experience.
5. Develop your skills as a facilitator, as well as a trainer.
6. Use feedback as a means to build participants up, rather than putting them down.

Chapter Seven: Bridging the Gaps – Training in Different Countries, Languages and Cultures

Really? This is the best Google translate could come up with?

Hmmm. . .How would that work exactly?

Working in a country, culture, or language that is new to you can be exciting.[22] There is so much to learn and it is always fascinating and invigorating meeting new people and seeing new sites.

However, this also creates a number of significant challenges that you would not face if you were working in your country of residence or one with which you were intimately familiar. Even if you have an understanding of the language, there may be nuances or cultural differences of which you're not yet aware. We frequently work in regional settings where there are participants from ten or more countries. Technically, all of the participants speak the same language. But the level of nuance among different dialects and accents and even very different vocabulary means that we can never assume everyone in the room has the same understanding of what's going on.

This chapter will cover some of the technical aspects of working in a place that is not your own, and how to communicate effectively as a trainer when you lose the powerful tool of language.

22 The above images were taken from the online article, "Lost in Translation: Funny Foreign Signs," http://www.chicagonow.com/cheaper-than-therapy/2011/05/lost-in-translation-funny-foreign-signs, accessed July 2014.

- **Section One: Working in Translation**
- **Section Two: The Benefits and Challenges of Being Different**

Section One: Working in Translation

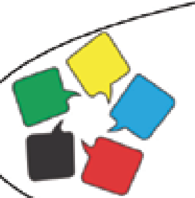
In the 1960's, the American automobile company Chevrolet produced a car called the Nova. In English, a "nova" is a star that increases in brightness, which is arguably a nice image for a product like a car. However, in Spanish, "no va" means "doesn't go." Legend has it that when Chevy tried to market the car in Latin America, no one would buy a car that doesn't go.

There is also a story told of a US airline trying to promote its new leather seats in the Latin market. Unfortunately, the slogan "fly in leather" was translated in Spanish to the equivalent of "fly naked."

There are disputes as to whether either of these stories are actually true or whether they are simply urban myths. Regardless of their veracity, they offer amusing examples of what can go wrong when working in translation. (Shannon has two similarly humorous examples from her own experience of mistranslations that led to serious misunderstandings. Unfortunately, the incorrect language that was used cannot be reprinted in a professional publication. . .)

Translation is a gift. It provides trainers with the ability to communicate with and get to know people they otherwise couldn't reach. Translators and interpreters are extraordinary people and NDI works with some of the best language specialists in the world.

But translation is a human gift, so there's always room for error. Following the guidelines below will help keep your margin of error as low as possible.



- Understand what form of interpretation you are using and design your training accordingly
- Ensure interpreters are briefed on content, objectives and outcomes
- Set your non-verbal skills on fire!

Understand what form of interpretation you are using and design your training accordingly

Technically speaking, translation refers to transferring written materials from one language to another (or others) and *interpretation* refers to doing this with the spoken word. However, in casual conversation, translation is often used to describe both methods.

There are two types of spoken interpretation that can be used in a live training: consecutive and simultaneous. Consecutive interpretation requires the trainer to stop speaking in short, regular intervals to allow the interpreter to repeat what he or she has said in the audience's language. The interpreter is generally standing next to or close to the trainer in this style.

Consecutive

The trainer pauses at regular, short intervals and the interpreter translates what she or he has said.

In simultaneous interpretation, the trainer speaks slowly and steadily, but essentially without interruption. Interpreters are stationed in the back of the room, typically in a small cabin, and repeat what the trainer is saying in the audience's language, almost at the same time. This type of translation requires the trainer, interpreters, and participants to have access to headphones and microphones since these are the means through which they communicate with one another.

Simultaneous

The trainer speaks without interruption and the interpreter translates his or her words with little delay. Microphones and headsets are used.

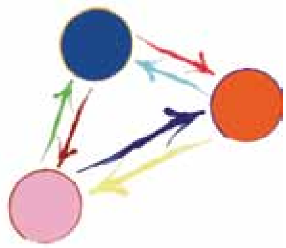
There are benefits and challenges to using both forms of interpretation, and they each require trainers to prepare differently for their sessions.

	Consecutive	Simultaneous
Pros	A good consecutive interpreter will repeat not only words but tone, intent, and body language as well Can be more dynamic and engaging	Great time saver so more content can be covered Effective method for covering more complex or advanced topics
Cons	Time consuming so less content can be covered Slower pace can be dull for participants who speak both languages being used or who require a faster tempo	Less interactive Cannot convey body language; less effective at conveying tone The headsets and microphones can be barriers to building rapport
How Trainers Should Prepare	With the slower pace, expect to cover less content and construct more modest training objectives Practice delivering training content in short sentences or phrases Meet with interpreters in advance to discuss flow and timing, review materials and go over any words or concepts that could be unclear or confusing for them	Practice delivering training content in a slow-to-moderate, steady pace If possible, station the interpreters' cabin so that you have eye contact with them in case of any confusion Meet with interpreters in advance to discuss the content, identify any points in the agenda where you need them to come out of the cabin and move to consecutive interpretation (e.g., for noisy or busy exercises where participants are likely to take their headphones off so they can move more freely), and go over any words or concepts that could be unclear or confusing for them

Ensure interpreters are briefed on content, objectives, and outcomes

The best way to avoid getting "lost in translation" is to ensure that all interpreters have a chance to review the training agenda and materials in advance. This will help them (in partnership with you, the trainer) identify any topics or terminology that could be confusing. For example, whenever Shannon is delivering a training about policy development for political parties in the Middle East, she always meets with interpreters ahead of time to discuss how they will translate certain phrases because the word for "policy" and "politics" can be the same in Arabic. A similar conversation has to take place before communication workshops because the word "message" can be translated to mean a number of things, including letter, email, text message, slogan, etc.

Most interpreters with whom we have worked like to see the materials in the language in which they were originally written. For example, Shannon will write her materials in English and then they will be translated to the language of the particular audience. Salam will typically construct his in Arabic (although he writes in English as well) and they go through the same process.



Interpreters play a vital role facilitating communication between trainers and participants.

The original materials, as opposed to the translated materials, offer the interpreters a clearer understanding of the trainer's intent as they have come straight from the proverbial horse's mouth, so try to ensure that you have copies available for interpreters before the workshops begins.

During your discussion with interpreters about potentially tricky words or phrases, it is also important to have a conversation about what exactly it is you are trying to achieve. What are the topics you are going to cover and why are you working with this particular audience on this subject? What is it you are trying to accomplish in terms of knowledge, skills and attitude? What training tools are you using and how will you incorporate the learning cycle? What feelings or emotional experiences are you trying to convey or create?

The more interpreters understand about what it is you are aiming to achieve, the more they can help you anticipate potential challenges and work in partnership with you to keep the delivery smooth and focused, and to communicate not just your words but the intentions behind them.

Shannon recalls conducting an exercise on training skills that she had (ironically) failed to discuss in advance with the interpreters. When she started to quickly shout out a list of exotic animals for the participants to try to memorize as part of the activity, she sent the interpreters into a tailspin. Iguana? Chinchilla? Tarantula? Howler monkey? What?!

These were talented interpreters who would have had the list perfect and ready to translate if they had received advanced notice, and the exercise would have worked a like a dream. Instead, it offered participants a real example of what *not* to do when training with interpretation!

The bottom line is that interpreters and translators should be treated like partners in program delivery. The more they know and understand, and the more you treat them like the vital instruments of communication that they are, the more effectively you will work together and overcome the extraordinary challenge of not speaking the same language as the majority of the people in the room.

Set your non-verbal skills on fire!

What word would you use to describe how this person is feeling?

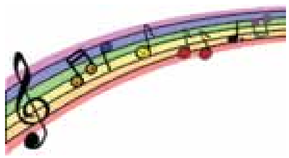
What about these people?

And this guy?

Moving right to left, your list probably looks something like this: bored, happy, and angry. But how did you know this? Did the people in the pictures come to life on the page and tell you how they are feeling?

You knew how they were feeling because of their *non-verbal communication.* Non-verbal communication refers to the visual cues we give about what we are saying, thinking or feeling.

Our facial expressions are one of the most obvious means through which we communicate non-verbally, but there is a lot more going on as well. It also comes through eye contact – how long and how well we maintain eye contact when people are speaking with us, even when they're speaking a different language. It comes through how we place our arms – are they crossed over our chest implying that we are closed to what others are saying, or open and inviting their input? It comes through our movement and stillness – are we in motion when we need to convey energy or emotion, but still when we need to demonstrate respect or concentration? It comes from our posture and how we hold our bodies.



And even though, when working in translation, the actual words you are speaking may not make sense to participants, the tone of voice that you use, the intonation, pitch, volume, and rate at which you speak will have an impact. It's a bit like music and can have the same kind of influence on an audience whether or not they can understand the words.

Working in translation is more taxing on everyone in the room. It requires participants to shut out a lot of background noise and work harder to pay attention. It is very demanding on interpreters who have to manage the communication needs of both participants and trainers. And it can be more physically challenging for trainers who have to build rapport, keep energy levels high, manage group dynamics, and deliver content as effectively as possible without being able to speak the language.

The more you can fire up and engage your non-verbal communication skills, and be aware of the messages you are sending through your posture, expressions and movements, the more you will reinforce what is being said verbally and make the entire process easier and more enjoyable for everyone.

Section Two: The Benefits and Challenges of Being Different

Romania was the first country Shannon ever worked in for NDI. At the time, she was in her early 30s and had been working in as a political activist and organizer since her teens. Romania was in the midst of a major political transition, still recovering from the revolution and execution of communist leader Nicolae Ceauşescu in 1989.

She remembers walking into a meeting room in a rural part of the country to talk with some political activists about voter contact. Sitting at the head of the table was an older man, probably in his late 60s or early 70s, who was introduced as the head of the local branch of the governing political party. The governing party was struggling at the time. Although it appeared to be the antidote to communism after the revolution, the party had never held any level of elected office before and was not learning on the job quickly enough.

When Shannon asked what the party was doing to organize support locally, the branch leader began to talk about what happened in Romania during World War I. After listening politely for several minutes, Shannon asked if he might move his focus to more current times and the party's present challenges. So he shifted to World War II. Only five or six decades to go and they would catch up to modern day. . .

The local leader had looked at Shannon and assessed that she was: 1) foreign, 2) relatively young for politics, and 3) female. Clearly she needed a full briefing of Romania's political history in order to understand what was possible in the next elections.

In some ways he was right. There was a lot that Shannon didn't know about the cultural context of politics in Romania. But there was more she didn't know at the time about connecting with people around what is similar rather than what is different. This was an education that took time and understanding.

Today, Salam and Shannon have worked in dozens of countries around the world and with people from just about every country in the Middle East and North Africa. It is an extraordinary privilege and gift to be welcomed in a land that is not your own and, as a trainer, to be treated as someone who has something of value to teach.

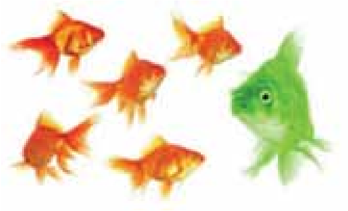
But it is an honor that is worth preparing for. This section will review some technical and attitudinal preparations to consider when training in an unfamiliar culture, where you could just as easily be perceived as interesting and enlightening or horrifically ill-informed, depending on your approach.

Please note: While much of the guidance given in this section could be applied to any country in the world, it is written within the context of working in the MENA region.

How to Make Different Better

Whenever you're outside of your own "wee patch" (as we say in Ireland), there's a chance to be perceived as different. But different is not always a negative characteristic and frequently this will be an asset, especially in the MENA region. As someone from outside, Shannon is always amazed by the generosity and kindness with which she is received when she travels in the region.

Being different can engender a degree of considerate curiosity among participants. Perhaps they've never met anyone like you and they have a lot of questions. They want



you to think well of the people from the area and are eager to make a good impression and help you learn more about them. Often, participants will see themselves as your hosts while you are visiting the country and will be generous with time or food or small gifts or invitations to other events. Hospitality and generosity in the MENA region are legendary – Shannon has been invited to numerous weddings and family feasts after meeting people for just a few hours!

In general, Salam and Shannon have almost universally encountered participants who are smart, friendly, supportive, and positive when they are met with respect from the trainers.

But even amidst the politeness, a certain degree of resistance or hesitation to a person or ideas that are atypical or unusual is natural. And the differences don't have to be dramatic for concerns to arise; a trainer traveling from the capital city to a rural area within his own country is likely to get a few curious glances and skeptical expressions at the start.

Using the techniques described in chapters two and five to help adults do their best and create a receptive state for learning can easily melt this type of resistance. As humans, we are designed to connect with one another and are more easily influenced by people we like. The more a trainer can demonstrate respect and build from the familiar (which means researching and understanding what would constitute "familiar" for this particular audience), the more participants will be open to a learning relationship with the trainer, no matter where he or she is from.

The biggest challenges to being different can occur when a trainer is either:

- ✓ Young, especially in a room full of older participants
- ✓ Female, especially in a room dominated by men
- ✓ From a group with which the local population is in conflict

When any of these factors are present, the trainer may have an even larger task ahead of him or her establishing credibility with participants. Similar dynamics may be in play when participants are recognized as high-ranking individuals in that society (e.g., senior political officials, members of parliament, etc.) and the trainer is unknown or perceived to be of a lower status.

Salam recalls a young female trainer who was asked to train officials from the local municipality, all of whom were men. She was concerned about how they would receive her. Even though they were from the same area and spoke the same language, the trainer was worried that traditional issues about youth and women would make this difficult for her. Salam's advice was:

1. Be aware of these differences but don't be afraid of them

The audience may initially think you're too young to know what you're talking about. They may think you don't have the right experience or that as a woman you can't possibly understand the true complexities of politics. Is it true? No, it's not. So don't validate it by believing it yourself.

These are predispositions, which we discussed in chapter two. Be aware that they may be there so that you can take action with your approach, your language and your demeanor to dispel them. Your role is to help participants shift their focus towards the training content and away from these predispositions, so consider the situation as one you can help transform rather than letting it be intimidating.

2. Begin to build a relationship with participants before the training

It is always worth investing time in building a relationship with the participants before the training begins, particularly if there are any concerns about group dynamics or how you will be received by the audience. Send out your CV along with a professional-looking photo in advance. Add supportive quotes or testimonials from other audiences you have worked with before, particularly those who might be well-known. Include a brief article about the training topic for participants to read ahead of time, or a short, relevant assignment they can complete. Begin to establish your credentials as a trainer and as an expert on the subject matter.

3. Work in an early win

In a training, a win is an "ah-ha" moment – a moment when participants learn or absorb something new and recognize and accept that this experience is going to be valuable for them. If your audience is particularly resistant or hesitant to engage with you, write your training so that there is a win very early in the agenda, so that participants feel the value of working with you as soon as possible.

4. Get your credentials out there

Even if you have sent your CV out to participants in advance, if there is a high level of resistance among participants to accepting you as a trainer find other ways to communicate your credentials. Put extra copies of your CV on the table and any other materials that validate your experience. If you can, ask someone who is a respected peer of the group or even a leader of their organization to come open the training, introduce you, and vouch for your abilities.

5. Invest in rapport

When a training audience is particularly hesitant or resistant, our instinct can be to withdraw when the opposite is needed. Spend time with participants during breaks and ask them about themselves. Invest time in building relationships with them. Knowing more about them will help you understand the sources of their predispositions and can help guide your approach.

6. Stay focused on the content

If, despite all of your efforts, things still get messy just follow the advice in the next chapter (chapter eight) about dealing with difficult participants. Don't get involved in personal arguments or let the agenda get sidetracked. Stay calm and do what you can to bring participants back to the issue at hand. Just do your very best and don't get discouraged.

7. Endeavor to work with rather than fix predispositions

The fact is that we will encounter people in the world who think young people have nothing to offer, that women are less capable than men, that those without a title next to their names are less worthy. Right or wrong, these are not opinions that we need to "fix" or even with which we need to agree. Our goal as trainers is to work with people to become better leaders in their own lives. Within the confines of the training room, we need to be aware that people will have a variety of opinions and experiences and that we need to create a receptive state for learning, no matter what their outlook might be.

Know Your Audience

In earlier chapters, we talked about getting a sense of who the participants in a training will be and finding out as much about their backgrounds as possible in advance. This is particularly important when this is a new audience and a new setting or culture for you.

Culture refers to the ideas, customs and social behaviors of different groups of people. Because the norms that are established as part of local culture are essentially choices, there can be a great deal of variety among what is appropriate in one place versus another. It is worth finding out as much as you can beforehand.

Additionally, we need to know what's going on socially, economically, and politically in the country at the moment. This helps us find ways to connect with people. For example, is there a football match going on that people are passionate about? Is there a local person competing on a television talent show? Is there an official caught up in controversy?

In addition to connecting with people, understanding the local landscape helps us avoid social and political "landmines." For example, Shannon once made the mistake of putting up a map of a country in which she was training to demonstrate a point about strategy, only to have a shouting match erupt among participants. What was the problem? The version of the map Shannon was using included a disputed area and there were severe disagreements about where the border should be drawn. That mistake took her a few minutes to undo.

The more we know about our audience and about what is going on for them, the easier it will be to build rapport, create a receptive state for learning and establish your credentials as a trainer.

Prayers and Gender Sensitivities

Two of the areas that are worth investigating in particular when working in the MENA region are prayers and gender sensitivities.

In some countries and with some participants it is important to know the prayer times. Include these in the agenda and ensure these breaks are respected.

In some places, participants will work prayers into pre-existing breaks. In others, specific times will need to be set aside in addition to (or in lieu of) breaks. If you're not sure, write your agenda with sufficient flexibility to accommodate prayers and ask participants at the outset how they would prefer to work in prayer times.

It is also important to be aware that in the MENA region there will be men who will not shake hands or come too close to a woman, and women who will have the same response to men, particularly those with whom they are not related or familiar. This is vital to keep in mind in terms of how you greet and approach people as the trainer, but it is also a factor in how you design exercises.

For example, Salam was training in a MENA country and conducting an exercise that involved physical movement. One of the women in the training asked him to stop from a distance as she did not want a man coming too close. Shannon had a similar experience running an activity where participants had to change their appearance. Even though it was an all-female training, participants were hesitant to fully engage because the translator was male. The translator was simply asked to step behind a screen and face the wall so that he could not see the women, and they carried on with enthusiasm.

When meeting people for the first time, wait until they extend their hand or approach you more closely before doing the same. Otherwise, use your facial expressions and body language to convey respect and a greeting. In some places, it may be helpful to put your right hand over your heart and bow your head slightly to indicate sincerity.

Additional Considerations for Working in MENA

There are a couple of additional nuances in the MENA region that are worth noting. First of all, in some countries it is acceptable to use shushing sounds to try to calm or silence an audience. In the MENA region, this is offensive and can humiliate participants. Instead, Salam and Shannon use more energetic noises to try to get attention whenever a training room is noisy – Salam uses a football whistle and Shannon uses a clown horn. These sounds connect with something participants identify as enjoyable and redirects their attention to the trainer in a positive way.

It is also advisable to be aware that "personal boundaries" are different from one country to another. As described at the beginning of this section, people are likely to be extremely generous with their hospitality and they don't necessarily draw a distinction between social relationships and professional ones. They will want to know you as a person, not just a trainer. Some visiting trainers will avoid getting too personal with participants in the name of being professional. It's a matter of finding the right balance between what is comfortable for you and not unintentionally offending someone.

Chapter Seven: Key Learning Points

1. Understand what form of interpretation will be used in the workshop and prepare accordingly.
2. Treat interpreters and translators as vital partners and ensure they have the information they need to do their jobs well.
3. Use strong non-verbal communication to minimize the challenges of working in translation.
4. Anticipate a degree of natural skepticism initially among participants when working in a very different environment. Use the principle of respect and rapport to overcome this and try to create a positive impression before the training even begins.
5. Be aware of and sensitive to local norms such as prayer times and gender relationships.

Chapter Eight: Dealing with Challenging Situations

> **"Learning is a social and emotional process, as well as an intellectual one."**
>
> United Nations
> Train the Trainer Manual

One of the most frequent questions we get from trainers who are just starting out is what to do with difficult participants. How do you respond if someone is giving you a hard time? What do you do if people don't listen or participate? What if participants are flat-out rude?

The truth is that this rarely happens (especially if you have followed the guidelines in the previous chapters of this manual!). In our collective decades of training, we've only had to ask one person to leave the room because he couldn't stop being disruptive.

Most of the time when people exhibit challenging behavior, they're really just going through a tough spot in their own learning process. Perhaps you've just dispelled a belief they've held their whole lives about leadership. Perhaps you've just helped them understand why their party lost the last election and that doesn't feel so good. Perhaps they've just realized that they're not the compelling public speaker they thought they were.

Or, perhaps there's an irritating personality in their working group. Perhaps the training approach isn't a good match for their learning style. Perhaps there's a new baby at home and they haven't slept in weeks.

The point is that people are very rarely difficult just for the sake of being difficult. There are almost always reasons that make a lot of sense to them, and many of these are related to the learning process or to their life experience. The more trainers can identify and understand when learning is happening, the more they will be able to help participants transform a strong reaction to a learning moment into valuable understanding and insight.

Section One:
Understanding Behaviors Associated with Learning

One of the most useful skills a trainer can develop is being able to identify when learning is happening, and when it isn't. Consider the scenarios below. Is learning happening:

- When participants are noisy and unsettled after an exercise?
- When participants are talking to the person sitting next to them?
- When participants don't have an answer to your questions?
- During coffee breaks and lunches?

Surprisingly (perhaps), the answer could be yes to each of these.

Sometimes, our instinct as trainers is to try to control the room. We mimic the behavior we have seen from the teachers of our youth who penalized bad behavior and admonished noisy children. The problem with this is that it can actually undermine learning. We know now that one of the best ways that children learn is through play and, frankly, adults aren't that much different.

This means that learning can be noisy. And messy.

This is not to say that the training room should be in complete chaos with everyone doing as they please. Maintaining order and structure and managing group dynamics are vital parts of a trainer's job, and help create the environment that allow participants to ease into learning. The key is being aware of when learning is actually happening, even in its messiest forms, so that you can facilitate it rather than mistaking it for disorder and shutting it down.

How can you tell the difference? When facing a situation that feels noisy or messy or chaotic, ask yourself these questions:

What are participants talking about?

Picture this: participants have just finished an interactive exercise and they're noisy and loud as they move back to their seats. Or, a participant turns to the person sitting next to him after having a moment of awareness or insight and starts a conversation. In these and similar situations, try to figure out what it is they're talking about. If it's the training content or something they've just done, they're in the learning cycle and verbally processing new information or skills. Facilitate this. Give them a bit of space to have these conversations. You don't need this to be disruptive or to take time out of the agenda, but you similarly don't want to respond as if something inappropriate is going on.

Conversely, if conversations are about Facebook or sports or fashion or gossip or something way off topic, participants are not likely to be in a learning moment. Redirect those conversations and bring participants' attention back to refocus on the training content.

What is body language like?

Are participants mimicking movements or ideas you've just reviewed? Are they trying out new skills? In this case, they're in the learning cycle.

Are they slumped or is their gaze unfocused? Are they fiddling with their phone? In this case, their attention is elsewhere. Bring their focus back to the training.

What are the group dynamics like?

If you've put people into working groups, especially if they're not likely to have known each other before, are they laughing together and building relationships? Are they dividing up tasks and deciding how they're going to organize themselves? Are they planning excitedly? In this case, they're in positive stages of group formation and this should be facilitated.

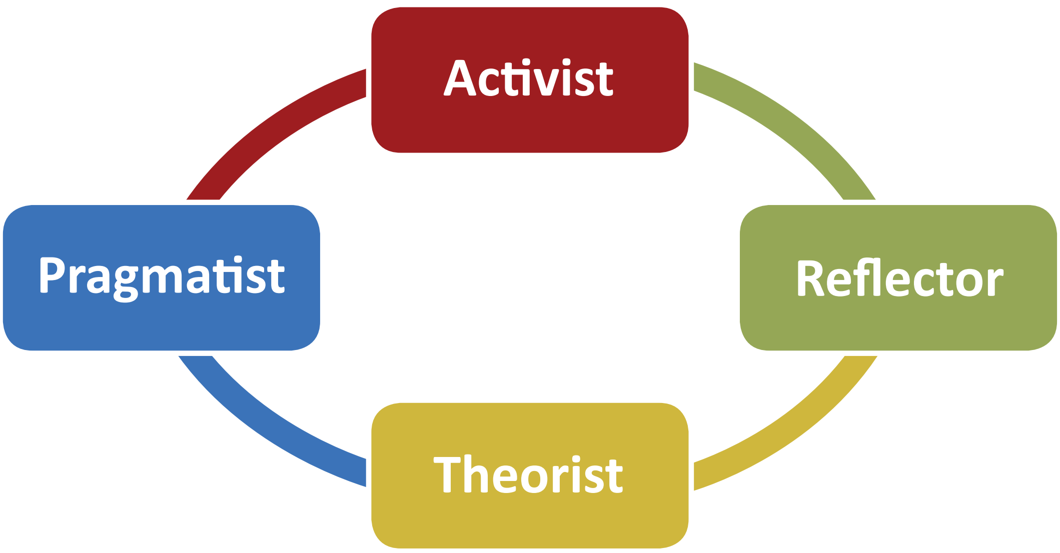
Are people not looking at each other or making eye contact? Is there tension or anger evident in the tone or volume with which people are speaking with one another? Is the noise coming from conflict? In this case, you need to find out what's going on and help participants transition to a different relationship with one another.

The bottom line is that not all noise is the same. Some of it is unhelpful, but some of it really is gold. There are cultural differences in what is considered disorder as well. The point is to be aware of what is going on and what is causing the disorder before labeling it and reacting to it. This is notably more difficult when you're working in a language you don't understand, which reinforces our point in chapter seven about treating interpreters as partners. They can keep you briefed on the dynamics at play as well.

Behaviors associated with learning styles

Another aspect of understanding behavior in the training room is developing a strong sense of when people are simply outside their comfort zones in a learning environment. Chapter two outlines different learning styles based on how adults often prefer to interact with new information. You may recall the graphic below.

Learning styles



Each of these learning styles has a particular "comfort zone" – preferred training tools and experiences that are a good match for how they most easily engage with new information. (These are outlined in the chart in chapter two.) Conversely, when what is offered in a training is not easy or is uncomfortable for participants with a particular learning style, they may display behaviors that could be perceived as challenging or difficult when, in actuality, they are just expressing discomfort about being outside their preferred approach to learning.

The follow chart gives a sense for what might trigger a negative reaction from different learning styles.

Learning Style	Comfort Zone	Discomfort Zone
Activists 	Activists like to be involved, engaged, and in motion. They are happy in the limelight.	Activists are less likely to enjoy: • Long discussions or planning sessions • Lectures or passive learning environments • Detailed or precise activities • Slower paced environments
Reflectors 	Reflectors prefer to watch rather than do and are often hesitant to become involved in more active or experiential aspects of training.	Reflectors are less likely to enjoy: • Role play • Activities that are time pressured or don't allow for planning • "Rapid fire" activities or ones which seek instant reactions • Short or limited instructions for a task
Theorists 	Theorists like to understand the theory behind actions. They prefer logical, step-by-step approaches and need models, concepts and facts in order to engage in the learning process.	Theorist are less likely to enjoy: • Activities that are perceived as trivial, meaningless, or overly emotional • Having to make decisions without sufficient information • Being judged or evaluated without clear, objective criteria

Pragmatists 	Pragmatists like to try new things to see how they will work in real life. They are largely practical and like to get things done.	Pragmatists are less likely to enjoy: • Training content or exercises that are not related to real or current needs • Guidelines that are not clear • Insufficient opportunities to try out new techniques • Learning where the benefits are unclear

As the chart outlines, Activists can easily become bored during phases of training designed to accommodate Reflectors and Theorists. Pragmatists can become annoyed if opportunities to practice new skills are minimized for Reflectors. Reflectors can become uncomfortable by exercises that Activists love. Theorists may become frustrated if not enough time is given to explain new concepts that Pragmatists are ready to test.

The point is that no training can accommodate all learning styles at every moment. There are going to be times when you ask participants to try something new or different or particularly uncomfortable for them and, sometimes, this may invoke a negative reaction.

As a trainer, your response should be to recognize that this participant is struggling at this particular moment and understand that their response is valid. Don't overreact or take it personally; this is more likely to be about the situation than about you. Listen to what they are saying (if they are expressing their discomfort verbally) or ask them what they're thinking or worried about if their discomfort is coming through in their body language.

Your response should be encouraging and supportive. Recognize that this probably is unpleasant for them, but urge them to try something new, to take a risk and see how it turns out. Reassure them that this part of the training won't last forever (because of course you've written a training that is multi-sensory and contains a diversity of activities) and that the more they put into it, even when it feels difficult, the more they will get out of it.

If participants are being disruptive to others or having a very strong reaction then you may have to have this conversation privately during a break, or even ask them to step outside for a bit and catch their breath.

Overall, when participants are in a bad place or having a negative reaction to something, you are better positioned as their coach or someone who can help guide them to make a different behavioral choice rather than as a combatant, or as someone who needs to tell them how wrong they are.

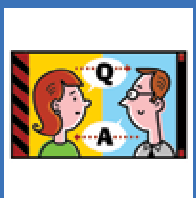
Section Two: Techniques to Help Prevent Conflict from Arising

Generally, when conflict or challenging behaviors arise in the training room it's because someone is anxious or responding to stress. Perhaps:

- It's a multi-party environment and it's very difficult for some participants to be in the same room with their political opponents
- Participants had a pre-existing, negative relationship prior to the training
- A participant is concerned that her status or position within the organization with whom you are working is not going to be recognized or respected
- A participant has had negative experiences with other trainings and is convinced that this is going to be a complete waste of time
- A participant has a difficult situation at work or at home which is weighing on his mind and he's struggling to concentrate
- A participant doesn't get a lot of recognition within the organization for his work so feels the need to speak out frequently so his colleagues can see how much he knows

Keep in mind as well that NDI works in a lot of environments where people have experienced (or are experiencing) high levels of trauma and stress as a result of conflict. One of the consequences of trauma is that it can make it difficult for people to control their emotions and this may be at the source of their behavior.

So, what can you do as a trainer to prevent conflict or anxieties from arising in the training room? If you follow the guidelines in chapter two about creating the type of learning environment that adults require to do their best, you'll be off to a great start. But trainings also frequently require structural support to help manage these dynamics and create ease among participants, even when working with populations that have not experienced conflict. A list of options is outlined here:

Technique	How to Use It	What it Does
Ideas Basket 	Label a piece of flipchart paper "Ideas Basket" or "Parking Lot"[23] and tape it up on the wall. When participants raise issues that are off-topic, note them down on the paper. Make arrangements to discuss divergent or controversial issues over lunch or in another session.	This technique helps trainers maintain the agenda when issues arise that are not appropriate or relevant, or for which there is not enough time. Participants who raise these issues feel heard, but they don't take over the agenda.
Learning Contract or Ground Rules 	At the outset of the training, agree to a set of guidelines or rules that the group will follow throughout in order to create and maintain a positive learning environment. Invite participants to come up with this list themselves, adding your own points only if major issues are left out.	This allows the group to come up with their own rules for how the training should be run. The trainer's job is to enforce them in order to maintain the learning environment the group has collectively requested.
Consultation Sessions 	Work time for individual or small group consultations into the agenda. Allow each group or individual the same amount of time and give clear instructions for how and what they should prepare for the meeting. These are frequently scheduled in the afternoons or evenings, once the full training session has completed for the day.	Consultations with the trainer provide small groups or individuals with an opportunity to discuss any difficult or controversial issues in a more private setting, and allow participants to ask more detailed questions about the training content or anything that's unclear to them.

23 The term "Parking Lot" is used frequently for this tool in Western training environments, but we find it less effective in other regions. Many countries just don't have parking lots so participants can't relate, and in some ways the term has become a euphemism for not taking people's ideas seriously.

Experience Books and Journals 	For the Experience Book, place a blank notebook somewhere prominent in the room or circulate it among participants at the end of each day. Invite participants to write their thoughts, feelings, impressions or concerns in the book for you to review and respond to. Journals allow participants to do this individually. Ask participants to write a few thoughts down in a journal at the end of every day. Start the next day by asking for volunteers to share what they have written.	This type of writing or journaling gives participants a chance to reflect on and capture their thoughts about the training and outline concerns in a more thoughtful way. Writing exercises like this can also help participants move through the learning cycle.
Mail Boxes 	Post envelopes on the wall of the training room with the name of each individual or group present in the training. Invite participants to write down notes to one another with constructive or supportive comments.	This can be a useful technique for both effective communication and time management. It allows the trainer to invite participants to write notes to one another if conversations or discussions are going on too long, and to offer each other support. It is important to establish ground rules about what type of language is permissible when using this method, and whether or not anonymous notes are allowed.

Time Management 	Stick to the overall timings on the agenda. If sessions are going over, use one of the techniques outlined in this chart to continue the conversations or discussions by other means, or follow the guidelines in chapter four about what to do when you have too much content and not enough time.	There are significant cultural differences about what being "on time" means, but a fair amount of anxiety among participants comes from concerns over whether their time is going to be used well, whether they will have the chance to deal with work demands, collect children on time, get a break at the end of the day, etc. The more a trainer sticks to the agenda timings within that cultural context, the less resistance there will be from participants about fully committing to the training.

Section Three: What to do When All Else Fails

Let's say that you've done all you can to create a great training. You've established an environment of respect and a receptive state for learning. You've constructed useful ground rules and managed time and content well. There's variety in your training tools and your communication skills are strong.

But still, there is someone in the room who is being disruptive. You've had a quiet, supportive conversation with him during the break, yet it's still a problem.

What can you do?

It is worth pointing out again that this rarely happens. Sometimes it can take a few individuals a bit of time to warm to what you are doing, but it is an exceptional occasion when there is a participant (or participants) who consistently engage in disruptive behavior. In fact, you'll find that if you've constructed the right learning environment, it's the other participants who will discourage their colleagues from disturbing the training, rather than you having to play this role.

However, if it does happen, we find a two-step approach is the best way to handle this situation.

1. Train to the triers

Have you heard the expression, "the squeaky wheel gets the grease"? It's an American idiom that means the loudest or most noticeable problem gets all the attention and all the resources. In this situation, you should try to do the opposite. Rather than directing all your attention and your energy to the person(s) causing the problem (the squeaky wheel), focus on the rest of the room – the people who are still trying (the triers).

This assumes that you've done all you reasonably can to be supportive and to help this person make a different choice about how they behave in the training room.

But training to the triers instead of the squeaky wheel is actually more difficult than it sounds. Have you ever gotten feedback or comments from a committee or panel on a piece of work that you did, like a paper or a presentation? Let's say there are five panelists and four of them give you high marks, but one gives you a mid-level mark or even a low one. Rather than focusing on the four high marks, we tend to obsess about the one lower one.

Our response to the squeaky wheel can be the same. We tend to take it personally, as a reflection on us or our abilities, when often it's really a case of someone struggling with issues that have nothing to do with us. The key is to recognize this, shift our attention and focus to the people who are committed to the learning experience, and train to the triers so they're not penalized as a result.

2. Ask the squeaky wheel to leave

If you're still getting nowhere, politely, calmly and privately ask the individual if they would prefer to leave the training. This doesn't have to be a difficult or combative conversation. Suggest to the person that this training clearly is not a good fit for them and maybe their time would be better spent elsewhere.

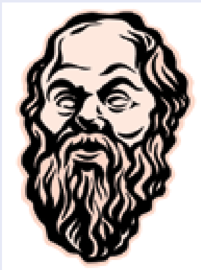
As noted earlier, we have only had to do this on one occasion in many years of training after an individual was persistently disruptive during a multi-day training. But otherwise, we have found that creating the right learning environment and understanding when learning is happening for people does the trick and helps keep things enjoyable for everyone.

Chapter Eight: Key Learning Points

1. Learning is a social and emotional process, as well as a cognitive one.
2. Not all noise and chaos are bad; sometimes learning is going on. Be aware of what it can look and sound like when learning is happening.
3. Participants can have a negative response when a training approach takes them outside their comfort zone for learning. Use these as opportunities for coaching and encourage participants to try something new. Don't take the response personally.
4. Use structural supports, like the ideas basket or separate consultations, to help manage group dynamics and prevent conflict or anxiety from arising.
5. Ensure the needs of those participants in the training room who are trying their best are not forgotten if there is someone exhibiting difficult behavior. Protect the interests of the triers if there is a squeaky wheel in the room.

Chapter Nine:
How to Evaluate Training

"The unexamined life is not worth living."



Socrates - Greek Philosopher

Training is hard work. It's great work, but it's hard work. A lot of resources – time, staff, money – are spent organizing and conducting training sessions. It must be a multi-million dollar industry worldwide. If we're going to make this kind of investment, and choose an approach that really is about improving lives – professionally and personally – does it not make sense to stop at regular intervals and ensure we're actually having an impact as trainers and program designers, and that it's the right kind of impact?

Evaluation forms have become a fixed item on the training "To Do" list now, but assessing the value of workshops and other training events has to be about much more than tracking the number of people who came, who said the lunch wasn't too bad and that they generally enjoyed the sessions. It has to be about whether or not we're actually having an impact, i.e., are we seeing positive change in the knowledge, skills and attitudes of participants? Therefore, an effective evaluation plan must be an integral part of each and every training.

- **Section One: What Are We Evaluating?**
- **Section Two: Active Evaluation**
- **Section Three: Formal Evaluation**

Section One:
What Are We Evaluating?

A training is designed to achieve specific learning objectives and outcomes, the construction of which is described in chapter two. For each objective and outcome that is set, we must also identify indicators to help us ensure that we are heading in the right direction. Indicators are measureable signs of progress towards achieving the objectives and outcomes and should be fashioned around the main three training elements:

- **Knowledge:** What knowledge do we want to gain or enhance?
- **Skills:** What specific skills we want to develop?
- **Attitudes:** What attitudes we will embrace?

In training we evaluate progress in:

Increase in ***knowledge*** or awareness
Skills development
Changes in ***attitude***

Indicators aren't always easy to define. Shannon recalls being in a meeting with a donor about constructing more effective indicators during which one frustrated participant yelled out, "How do you measure love and democracy?!"

So it's important to be aware that trying to evaluate these elements is not always easy and it is not an exact science. Among the three, **knowledge** transfer is probably the most easily suited to evaluation. For example, if one of your objectives is to ensure participants understand the meaning of democracy, you may ask participants to write down what they think democracy means at the beginning of the training and then do so again at the end. More accurate or sophisticated responses at the close of the course would indicate the progress has been made.

Knowledge

Skills

Attitude

But what about the **skills** tied to this? Maybe the session includes training on problem solving through cooperative means or negotiation as a skill tied to democracy, or even something like constructing a strategic campaign plan. This can be evaluated or assessed through different exercises during the workshop to gauge the extent to which participants have absorbed and can demonstrate the technical side of the topic. Participants can also be asked to provide their own verbal or written evaluation of how they feel ready to practice these beyond the workshop. Additionally, we can follow up with that participant later to ask if they have continued to apply or use the skill in their personal or professional lives.

Among the three, **attitudes** are possibly the most challenging to evaluate, because this is about changing the perspective of participants from within. At the conclusion of the workshop, do participants really feel and act more democratic? This is harder to know. Perhaps we can construct an assessment form that outlines various scenarios and asks how they would respond to each, but then we can only assume their response would be the same if confronted with the same situation in real life.

Essentially, follow-up with participants beyond the workshop is the best way to track progress or development in terms of attitudes. Options include different forms of re-engagement or check-in meetings, asking participants to maintain a journal, or interviewing the participant after a training is over to assess whether they interact differently with colleagues within their organization, during events with peers, through books or articles they may write, in meetings with stakeholders, on television shows, and so on.[24]

Here's an example: In a training on negotiation skills, knowledge on various negotiation strategies will be discussed and participants will know that it is always good to follow a win-win strategy. The participants will practice the necessary skills through exercises on how to think a certain way and how to use phrases and body language that follow the win-win strategy. Some of them may be very capable of implementing the Win-Win strategy during practical exercises. But the bigger challenge will remain: when

they are back home and are facing real negotiation with their wives, or their teenage children, or their boss at work, will they behave based on the training they received and on what they learned? Did the training on negotiation change their attitude as it applies to their real lives?

Section Two: Active Evaluation

There have been a number of references in this manual to being able to "read the room" as a trainer or facilitator, and being aware of all the elements of communication: the sender, receiver, message, environment, and feedback.

24 Shannon recalls a conversation with a long-time NDI workshop participant who ultimately realized one day that democracy actually began with the way he treated his wife and children at home, and that this completely changed the way he saw how politics should work in his country.

Being aware of and engaged in all of these elements is a form of active evaluation – essentially evaluating while training. Are participants engaged? Are they involved in the learning process? Are they asking questions seeking more understanding or more explanation? Are they bringing new ideas to the discussions?

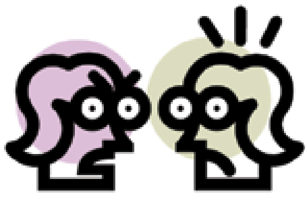
Verbal and non-verbal feedback from participants are very good indicators that tell us whether or not participants are learning. The trainer must pay active and consistent attention to those cues throughout the process to ensure that learning is happening. Some examples of how to do this are offered below.

Scenario 1 → Evaluating Participant Knowledge

You are conducting a two-day training on, "Leadership." You started the course with an exploration of the research on leadership and whether leaders are born as such (nature) or whether anyone can develop into a good leader (nurture – for the record, the answer is nurture). On the second day, you are facilitating a discussion on what it means to take initiative as a leader and you note that most participants are saying that this depends on what we inherit from our parents' genes. This is a strong indicator that the participants did not absorb the key learning points from the previous day and you will need to revisit them again in a different way.

This was an active evaluation where you recognize that if you go further while participants are still working with an incorrect assumption about leadership and initiative, the rest of the training will be a waste of time. If you don't recognize it, you may be shocked at the end of the training, and worse, after the training when little or no impact can be seen.

Scenario 2 → Evaluating Attitudes

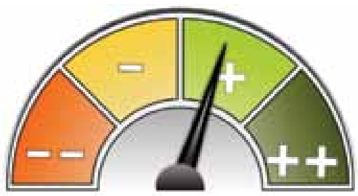


During a training, you hear some mumbling among participants and see a lot of closed body gestures. Arms are crossed and there is limited eye contact. Clearly there is something going on among participants and their current perceptions and attitudes. It may not be about the training at all, but you need to find a way to understand what is going on because this mood is blocking engagement and preventing learning. Find an appropriate way to learn about what is happening, address it, and then continue. Think of this challenge as an open Pandora's box sitting in the middle of your training room. You need to close Pandora's box before opening the learning box!

We can also receive feedback at coffee breaks and during lunch, when participants and trainers are often mingling together informally. It is always better for the trainer to be close to participants and create a positive and strong relationship that makes communication honest and free on different levels. Listening to their comments to understand how the participants feel, whether there is anything blocking the learning process, and gaining feedback from them on how to make the training a fun learning journey are all ways to give participants an opportunity to take more ownership in their own learning. A trainer with an open mind can do this.

How can you evaluate this feedback?!

Section Three: Formal Evaluation



When a training course lasts for more than one day, trainers and program managers need to decide whether or not to conduct some form of evaluation every day or wait until the completion of the course. The problem with waiting is that participants may have forgotten some of the things they would have wanted to say earlier (including forgetting some of the things they have learned), and opportunities to directly address any problems can be lost. Even simple matters can be addressed more effectively this way. For example, on a five-day training, there is no need to wait until the end of the fifth day to find out that the timing of the tea break was preventing participants from practicing their prayers. This could be solved from day one. Therefore, we recommended integrating some form of formal evaluation everyday on a multi-day course.

The goals of daily evaluation are to:

- Evaluate the progress of participants and the general performance of the training and management teams
- Solve any immediate issues that might impact future training days
- Make the evaluation process more focused and detailed
- Make progress toward the final evaluation, which will assess whether learning objectives and outcomes have been achieved

The daily evaluation should be used to try to answer the following questions:

- Did learning happen?
- Are participants comfortable with the agenda and timing in general?
- Did participants find value in the content of the sessions?
- Are the knowledge and skills something they can see themselves using going forward? If so, how would they use them?
- How did the participants assess the quality of the trainers and the training techniques being used?
- How do participants assess the logistics and the overall training structure and environment?

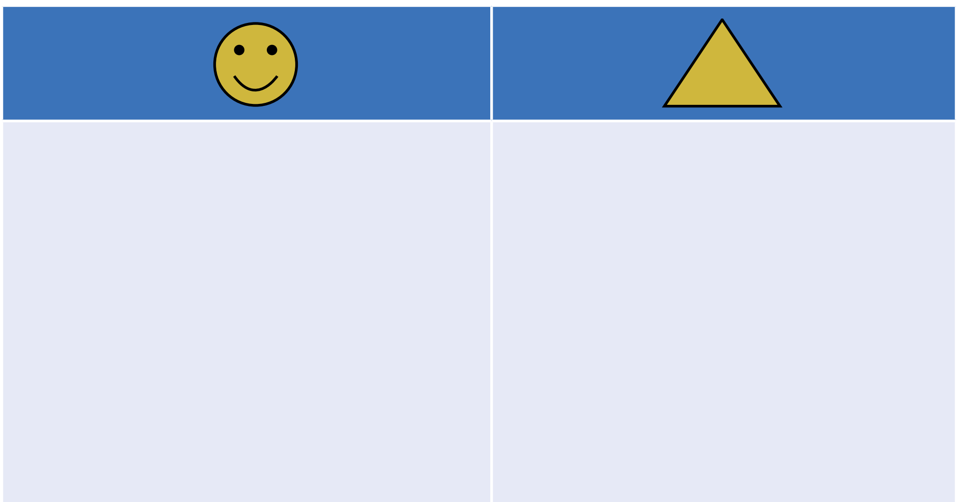
Knowing this information will help to address any emerging problems or issues, will make the learning process smoother, and will help to eliminate barriers that may be blocking participant engagement in the training.

How can this type of daily evaluation be conducted? Some options are listed below.

Verbal Group Assessment	At the end of the day, trainers and participants gather in a circle for an open discussion of what they have learned, what stood out, what questions or concerns or confusions they may still have, what they want to do or try more of, feelings about logistics, etc. Remarks are noted on the flipchart. The facilitator of the discussion can rotate daily among trainers and participants This works only for small or medium-sized groups The intimacy of the setting (everyone is there) may make it difficult for some people to offer criticism
Keep/Change Discussion	The facilitator of the discussion draws a line down the middle of a piece of flipchart paper. One side is for positive things that the participants think went well and that they like (noted by a smiley face). The other column is for things that could be developed or changed (the triangle or delta is used as a symbol for change). See figure 1 below for an example. The facilitator of the discussion can rotate daily among trainers and participants This works best for small or medium-sized groups The intimacy of the setting (everyone is there) may make it difficult for some people to offer criticism
Daily Evaluation Wall	At the end of the day, trainers can post blank flipchart paper up on the walls. Participants can be invited to write their comments about the day on the paper, either anonymously or signing their names. Once they have written their own thoughts, participants can move around the wall and read the comments of others and either sign or place a tick next to opinions with which they agree. Asking specific questions on each piece of flipchart paper may make it easier for participants to offer constructive feedback

Written Evaluation	One of the most common methods of evaluation is handing out a pre-prepared form at the end of each day that participants can fill in anonymously. These usually involve a number of questions that ask participants to assess the training, content, agenda and logistics on a scale (from 1 to 5, for example). There are typically one or two open questions at the end as well, which allow them to include any additional thoughts or opinions that were not addressed in the form.
Pre and Post Assessment	Pre and Post Assessments (or "tests") are being used more frequently to try to evaluate the level of KSA transfer to participants. In this method, participants fill out a questionnaire at the beginning of a training course, and then fill out another blank copy of the exact same questionnaire at the end to assess whether any progress has been made. These can be useful tools but they have to be handled carefully. They feel like tests from school and participants often have a negative response to them if they feel they are being tested unfairly. It is important to find a method to code the assessments anonymously so that it is possible to track individual progress without having participants write their names on the forms; named assessments have the potential to introduce bias

Figure 1: Keep/Change Flipchart



Most methods will include a combination of quantitative and qualitative questions.

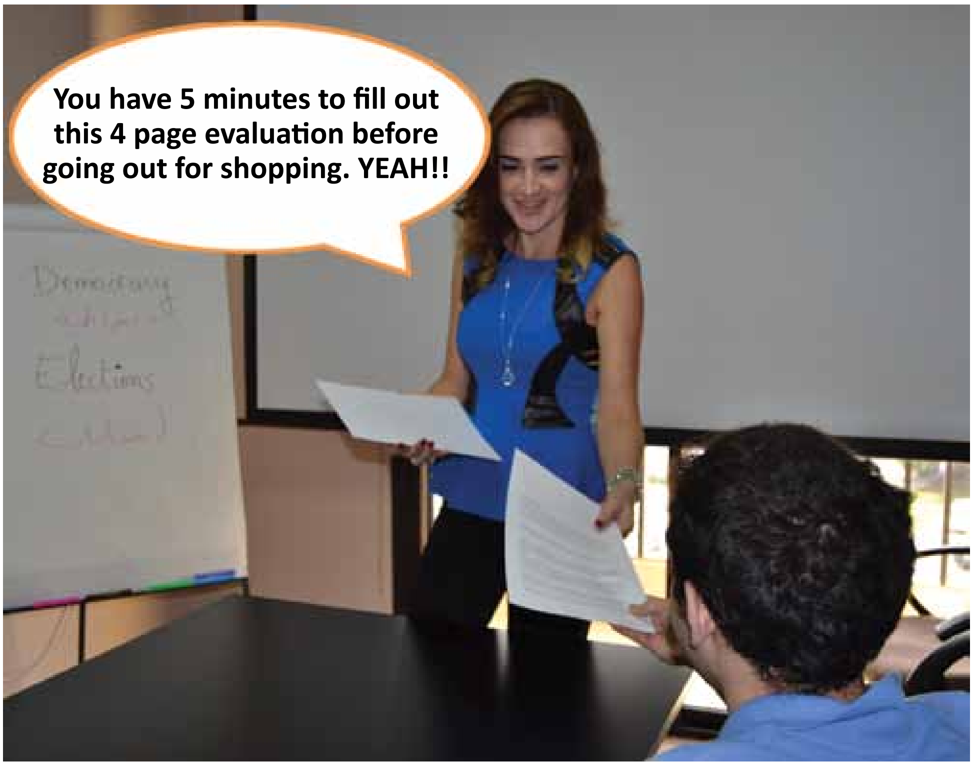
Quantitative questions – usually asking participants to evaluate something based on a scale, such as 1 to 5 or very good to very bad – provide more concrete measurements for assessment and shorten the time required to complete the evaluation. However, we don't know why participants feel this way and we don't have their suggestions for how to improve anything that's not working.

Qualitative questions are open-ended and provide more depth and texture to participants' responses. They also are a way of capturing anecdotal evidence of knowledge transfer and personal development and generating a better understanding of why something might or might not have worked well. But they are more time consuming for participants to wade through, so a good balance between quantitative and qualitative usually works best.

Whichever evaluation method is chosen, it's important to keep in mind that evaluations should not just be "tick box" exercises or busy work for participants. Evaluations are a critical opportunity to improve the learning environment and the quality of the learning experience in real time, and should be used as such by the training and program teams.

Additionally, logistics should show up in some form in the evaluation process. Logistics affect all aspects of the learning process – the social, emotional and cognitive – as they create the environment in which the training lives. Therefore, it's always worthwhile to ask about:

- Length of flow of training days – too long, short or sufficient?
- Time allowed for each topic – too long, short of sufficient?
- Trainers' performance (if this has not been evaluated by other means)
- What are the participants' opinions on the venue – lighting, seating, room temperature, etc.
- Food and breaks
- Transportation (if it was provided)
- Lodging (if relevant)
- Space, time and opportunities to socialize
- Any other related issues



Chapter Nine: Key Learning Points

1. Evaluation processes should be constructed around the defined learning objectives and outcomes.
2. Trainers should actively evaluate the training as it is going on and not wait until the end of the day or the end of the program to invite and respond to feedback from participants.
3. Formal evaluation should be conducted on a daily basis and should be used by trainers and program staff to improve the learning experience in real time.
4. Formal evaluation should employ a combination of quantitative and qualitative questions to assess the impact and value of training sessions.

NDI
NATIONAL
DEMOCRATIC
INSTITUTE
FOR INTERNATIONAL AFFAIRS

MEPI
Democracy • Economics • Education • Women