Section 3: Training Basics

What Does it Mean to Facilitate?

Facilitating means a lot of things. The table below provides an outline of the topics discussed in this section:

Topics	What is Discussed
Know Your Audience	Demographics, knowledge, skills, attitudes, experience, job/position, education, and training needs
Apply Adult Learning Principles	 Understand adult learning principles Use repetition to encourage remembering Blend styles Provide a variety of learning methods and materials
Be Prepared to Train	 Know what you are training Use effective organization skills Practice Prepare the training room Have a backup plan
Manage the Training	 Manage training time Manage difficult participants Manage difficult locations and facilities Manage equipment and materials
Communicate Effectively	Facial expression, voice, eyes, ears, nose, hands, feet, mind, and heart
Engage the Participants	Using questions to engage participants and determine their level of understanding
Use Visual Aids Effectively	Tips on using visual aids

One of the most important aspects of training is to know who your audience is. Knowing who your target audience is will help you know how to design your training and also who to invite to the training course.

Following are some outcomes of identifying who the audience is:

• Demographics (i.e., age, sex, where they work)

This will help with logistics of the training as well as for planning for the types of examples to use in the training.

Knowledge

Knowing the in-coming knowledge level of the topic will help determine what level of content is needed (low, medium, or high) and what type of exercises are needed.

• Skills

It is important to know what the in-coming skill level is of the participants so you will know how to plan what skills to teach. It will help determine if the training is to provide new skills or simply a refresher to skills the participants already know.

• Attitudes

Knowing what the attitudes are about the topic of the training can help address fears, concerns or biases during the training.

• Experience

Knowing the experience level of the participants will help when designing the content and exercises. It will also help in knowing what technical level is required for training. In addition, it will help you can identify those people who have a lot of experience and can contribute to the discussions. Also for exercises you can pair-up participants who have a lot of experience with those who have less experience.

• Job/position

Knowing the jobs or positions that the participants have will help you relate the training to their jobs.

Education

Knowing the education level and also the type of education of the participants can help you know what level of language to use, as well as what type of examples to use.

• Training needs

Knowing what the training needs are of the participants will help you design your course to provide training skills that will actually be used. If participants don't need certain things in a course it may help you know what information to delete or what to cover quickly.

Ways to Learn about the Audience

There are many ways to learn about the audience that include:

- Conduct a needs assessment
 - Have participants complete a pre-assessment form. It is best to have them complete the form and send it to you before the training but sometimes that does not work out. If so, have them complete it at the beginning of the training.
 - Before the training, talk with participants and others knowledgeable sources (i.e., supervisors)
- During the training, include a "get-to-know-you" exercise

Apply Adult Learning Principles

Many people think that training adults is the same as teaching students in a traditional school system. But this is not true. Adults learn differently from children and require different training approaches. Knowing how adults learn is critical to the success of your training courses. The following chart describes some important adult learning principles and training techniques you can use to engage the adult learner.

Principle	Training Technique	
Adults bring a wealth of knowledge and experience and they want to share their knowledge and experience	Encourage participants to share their knowledge and experiences. Include activities that utilize their knowledge and experience	
Adults are decision-makers and self- directed learners.	Include problem-solving activities	
Adults have different learning styles that must be respected	Provide multiple ways for participants to learn the material	
Adults want to participate rather than just listen to a lecture	Create a participatory learning environment with various types of activities	
Adults are motivated by information or tasks that are meaningful and applicable to their jobs.	Relate the content and skills to the participants jobs	
Adults prefer training that focuses on real life problems	Relate content to the types of problems they encounter in their jobs	
Adults expect their time during training to be used carefully	Follow a realistic time schedule	
Adults feel anxious if participating in a group that makes them look uninformed, either professionally or personally	Avoid criticism. Acknowledge all participants contributions.	
Adults learn best in a positive environment where they feel respected and confident	Create a positive environment by provide positive feedback and showing respect to all participants.	
Adults come from different cultures, life- styles, religious preferences, genders, and ages.	Respect all differences and encourage participants to respect each other's differences as well.	

Three Basic Learning Styles

In addition to principles of adult learning there are three basic learning styles. These include

- Visual: Learn through watching, observing, and reading
- Auditory: Learn through hearing
- Kinaesthetic: Learn through moving, doing, practicing, and touching

Most people use all three styles, but usually have a dominant or preferable style. The style of learning that people use also depends on the skills and knowledge that are being taught.

For example:

When leaning how to counsel clients, participants use:

- **Visual** to learn protocols, observe good counselling behaviours
- Auditory to learn ways to say certain things,
- **Kinaesthetic** to learn how to counsel the patient, say the right words, show compassion, follow the right counselling methods

When learning how to perform an HIV rapid test, participants use:

- Visual to see how to perform the tests
- Auditory to learn ways to say certain things,
- Kinaesthetic to practice performing the test

What Adults Remember

The following chart provides information on what adults remember. This is very important for knowing how to design your training. If a trainer only lectures then participants will probably only remember 20% of what is said. So creating a participatory training where participants are active and "saying and doing" will help them remember more from the training.



What Adults Remember

Use Repetition to Encourage Remembering

For people to actually learn something they sometimes have to hear it 7 times.

So Repeat, Repeat, Repeat

- In the Introduction: Tell them what you are going to tell them
- In the Presentation: Tell them
- In the Summary: Tell them what you just told them

So less content with more repetition may mean more learning will occur!

Blending Styles

Following is a well-known saying in training courses:

I hear and I forget. I see and I remember. I do and I understand.

But remember:

- Some people learn (and remember their learning) primarily by hearing others talk.
- Some people learn primarily when they only see someone do an activity or they can see visuals and printed materials
- Some people learn by moving and doing

Key Point to Learning Styles

So how do you plan your training given all of these different aspects about how people learn? The goal is not to focus on one style of learning but to use a blend of methods to reach the greatest number of adult learners. For example

Provide a variety of learning methods such as

- Lectures
- Discussions
- Role-plays
- Exercises (i.e., quizzes, brainstorms)

Provide a variety of training materials such as:

- Slides
- Manuals/handouts
- Videos

Be prepared to Train

Know what you are training – this is very critical to the success of the training. Even the best of training skills will not hide the fact that a trainer does not know the content.

- Know the goals and objectives of the training
- Know the content of the training
- Know the training activities (i.e., discussions, exercises, role-plays, demonstrations)

Use effective organizational skills

- Organize the training logically
- Follow a plan
- Use checklists
- Keep everyone informed

Practice

Practicing your training presentations helps to ensure that they will be successful.

- Out loud in front of a mirror (if you will be standing to present then practice that way)
- With the materials and equipment before the training
- Rehearse in the training room if possible
- Time your presentation

Prepare the Training Room

- Check room before the training
- Make sure all of your materials, supplies and equipment are available
- Arrange training room to allow for the best learning situation
- Test all equipment before the training
- Download files on the computers (if necessary)
- Prepare as much ahead of time as possible (i.e., flip chart pages, distribute manuals/handouts, arrange things for activities, exercises and demonstrations)

Have a Back-up Plan

Sometimes problems occur so it is best to have a back-up plan for those problems that can be anticipated.

- Have extra materials and supplies available
- Use multiple formats (handouts, slides, overhead transparencies, flip charts). Sometimes the electricity will go out and so the PowerPoint slides will not be able to be shown or maybe the bulb on the project will blow out. Having handouts available will enable the training to continue.
- Be flexible. Problems often occur so relax and adjust to the situation.
- Make positive situations out of negative ones. For example, when problems occur make them into a learning situation.

As the facilitator you are the **manager of the training**. It is up to you to create a successful training that meets the goals and objectives. Following are some suggestions for how to manage the training.

Do Your Best to KEEP ON TIME – it shows respect for:

- Your commitment to the time allotted
- · The participants so they know what to expect
- Those that follow your presentation so they don't have to rush through or cut short their presentations

Ways to Keep on Time

- **Practice before the training.** Practice the presentation out loud. Review your material so you will know what can be covered quickly and if necessary deleted. Practice your presentation using the equipment. This will help you determine how long it takes for presentations and activities.
- Use a clock that the facilitator can see.
- Use an agenda that shows the amount of time for presentations as well as the times of day. For example:

8:30 – 9:00 30 minutes. This reinforces the amount of time that each presentation takes so that people don't have to add it up in their heads.

- **Review the agenda with all facilitators ahead of time**. Emphasize the importance of staying on time and how it shows respect.
- Set up a time keeping structure and review with facilitators
 - Designate a time-keeper to provide visual reminders with signs that show
 - 5 minutes
 - 1 minute
 - Stop
 - If necessary, use a bell to signal the end of the time
 - If the bell doesn't work you may have to interrupt
- Keep the training focused on the objectives
- Let participants know what to expect. Review the agenda at the beginning of each day.
- Use the "parking lot" for discussions that take too much time or are related to but not critical to the training – but they are critical to the participants
 - The "parking lot" is a sheet of flip chart paper posted on the wall of the training room. The purpose is to provide a place to put interesting topics that are taking up too much time or are related to but not critical to the training. These topics are usually critical to the participants. The topics are written on paper and sit in the "parking lot" until time is available to discuss them at the end of the course or during breaks, lunch or at the end of the day.
- Refer to handouts in the manual for more details
- Know the "need to know" content
 - Know what content or activities can be shortened or deleted

• Adjust the schedule when things take longer

- Shorten breaks, lunch
- Lengthen the day
- Delete some presentations or activities

Manage Difficult Participants

Managing participants in a training situation is an important skill to have as a trainer. Using "ground rules" (see handout on Ground Rules) at the beginning of the training can provide a means of establishing how people should act during the training.

When there are participants who are difficult, it is up to the trainer to manage the situation so that participants do not disrupt the training. Following are examples of difficult participants and how their behavior can be managed

• "Dominates the conversation"

There is usually at least one person in each group that tries to dominate the conversation. They frequently have a lot of experience and knowledge and are very eager to share that with everyone. Ways to manage this behavior include:

- Refer to the ground rules (Be sure to include in the ground rules that no one person should dominate the conversation and that all participants should have the opportunity to contribute)
- Thank them for their valuable contribution and say that we need to also hear from other participants
- Mention that they have already provided a lot to the discussion and you want to hear what other people have to say
- Use body language such as not looking at them when asking for responses and standing in front of them and looking at the other participants for responses
- When asking for responses it may become necessary to ignore them
- It may become necessary to interrupt them and summarize their comments before hearing from other participants
- Give them a task to do that supports the course objectives
- o If necessary, speak to them outside the training room

• "Interrupts others"

Some participants have a habit of interrupting others so as the trainer it is important to manage this type of behavior. Ways to manage this behavior include:

- Refer to the ground rules (make sure that one-person should talk at a time is included as a ground rule at the beginning of the training).
- If they continue interrupt mention that the other person was not finished.
- \circ If necessary, speak to them outside the training room

"Know-it-all"

Some participants will try to challenge the trainer or try to make the trainer look bad. They think they know everything and will make remarks to undermine the knowledge or authority of the trainer. Ways to manage this behavior include:

- Acknowledge their valuable experience and ask if there are other opinions
- When they ask you a question ask them what they think the answer is or open up the question to others
- Give them a task to do to help with the training
- o If necessary, speak to them outside the room

• "Does not participate"

Some participants will not respond. They may be shy, or not interested, or have been forced to attend the training, or may not be an appropriate person to be attending the training. Whatever, the reason it is important to encourage all participants to contribute. Ways to manage this behavior include

- Use your body language to encourage them to participate.
- Look directly at them when asking to hear from some of the people who have not contributed
- Stand by them and look at them when asking questions
- Talk to them outside the training room to establish a connection
- Find out about their experience and knowledge so that can be incorporated into questions.
- Ask them to help you in some way (i.e., write on the flip chart, pass out papers, summarize key concepts)
- If necessary, ask them outside the training room why they are not involved in the training.

• "Does not want to be at the training"

Some participants are forced to come to the training by their supervisors. So they can resent the training and see it as a punishment rather than an opportunity to learn. Ways to manage this behavior include:

- During the introduction to the training you can mention that everyone is coming to the training for different reasons that you would like to set a tone of open-mindedness because everyone can learn something from any situation.
- Emphasize the value of each individual and how they will contribute to the success of the training.
- Specify the follow-up process to the training. Emphasize that they may need to demonstrate the skills as part of their job requirements.

Also, some people like to attend trainings because it simply gets them away from the office or they can earn extra money through the per diem. As a result, they may not think that their active participation or learning the content is necessary. Ways to manage this behavior include:

- Emphasize the value of each individual and how they will contribute to the success of the training.
- Ask them to help you in some way.
- If necessary ask them outside the training room why they are not involved in the training.
- Specify the follow-up process to the training. Emphasize that they may need to demonstrate the skills as part of their job requirements.

This situation can be avoided be ensuring that the right participants attend the training. Communicate with supervisors about the criteria for who should participate in the training.

Manage Difficult Training Locations

Location of training course

Adult learners have responsibilities for their families and their jobs and so it is difficult for them to attend trainings away from work or their families.

- Too close to work
 - Some locations are too close to work and they get distracted. Choose a location that ensures that participants will provide their undivided attention this might mean a hotel in another city.
 - If it is important for participants to do course work at night, it is important that the training be held out of town where they stay in a hotel. Adult learners have responsibilities for their families so it is difficult for them to do work at night.
 - Participants are more likely to arrive on time and be focused on the training if they stay in a hotel.
- Difficult to get to

If locations are difficult to get to it can discourage participants from attending. This is an important consideration if the training is held in the same city where the participants live. If it is difficult to travel to the location it can be more expensive and require extra time to get to.

• Choose a location that is easy to get to.

Training room

- **Temperature** The temperature of the training room can cause participants to be too hot or too cold. And the "best temperature" will vary from person to person. Try to choose a medium temperature that is comfortable for "most" participants.
- Electricity There needs to be adequate electrical outlets for the training and the outlets need to be in appropriate locations. If extension cords have to be used make sure they are secured so people do not trip over them.
- **Lighting** In appropriate lighting can be very distracting to the training especially when showing slides. So try to choose a training room that enables you to lower the lights enough for people to see the slides, computer screens, videos but bright enough to read their handouts.
- **Layout** When the training room is too big, too small, or too narrow it can cause problems. It is important to check out the room before the training to ensure that it is the right size and can be set up in a way that maximizes learning and provides a comfortable environment.
- **Noise** noise level can be distracting. So choose a training location that does not have outside noise level.

Manage Difficult Things

• Equipment problems

- Sometimes equipment (especially computers) does not work
- Sometimes equipment does not arrive
- Sometimes the wrong equipment is sent.

Plan ahead and have back-up plans. Be sure to checkout the equipment before the training to prevent unexpected problems during the training. If equipment is provided by someone else (or a company) be sure to put your request in writing and double check before the training that the correct equipment will be provided.

- Materials
 - Sometimes these do not arrive on time
 - Sometimes the manual was not assembled correctly.
 - Not enough materials

These problems can be avoided if you plan ahead and have materials delivered in plenty of time to correct any mistakes.

Communicate Effectively

Being a good facilitator requires having good communication skills. You have many ways of communicating that can help you in your training.

Ways to Communicate				
Facial expression	Ears	Feet		
Voice	Nose	Mind		
Eyes	Hands	Heart		

Use your Facial Expression

- Set the tone of the training (friendly and supportive) if your expression is friendly and approachable it will encourage participants to engage in the training
- Convey a friendly expression Smiles are contagious. If you smile, participants tend to smile back. This is one way to create a friendly and supportive training environment.
- **Provide positive reinforcement** By smiling when people respond, they are more likely to respond again
- Show enthusiasm If you show enthusiasm for your training it encourages the participants to be enthusiastic also

Use your Voice

Your voice is the **main way and most important way to communicate** with participants.

Your voice

- Sets the tone of the training (friendly and supportive)
- Conveys most of the training content
- Shows enthusiasm
- Encourages participation
- Provides positive reinforcement
- Can be used to help manage the training

Use trainer's voice

- Project your voice so everyone can hear you what you have to say is important and it is critical that everyone hears you.
- Vary your pitch so you sound interesting and provide emphasis to those things that are important
- Use a comfortable and varied pace to provide interest and emphasis. If you speak too fast, participants might miss some of your most important information. If you speak too slowly, it can put them to sleep. It is also

important to use the appropriate pacing for the types of training you are doing. For demonstrations or complex information, you will need to speak a little slower. If your accent or language is different from the participants then speak slowly enough that they can easily understand you.

- Speak at the right technical level
- Use a friendly tone
- Use a microphone, if necessary. Practice using a microphone and check with the participants about what is the best level for your voice. Don't hold the microphone too close or too far away. Also, ask participants to speak into the microphone when they are asking questions or commenting.

Use your Eyes

Way to communicate with participants

- · Show enthusiasm
- Encourage participation
- Provide positive reinforcement
- Manage the training

Way to observe

It is important for you to observe what is happening with the participants to determine things such as:

- Are participants engaged?
- Do participants understand?
- What is the energy level?
- Are there group dynamics?
- Who is not participating?

Use your Ears

Important way to communicate with participants

- Listen to participants. This is a very important skill for a facilitator especially when creating a participatory learning environment
 - Listen and wait for participants to finish what they are saying
 - Use pauses to allow participants respond
 - Use silence to manage the training

Way to hear

- Do participants understand?
- Are there concerns?
- What are the needs of the participants?

Use your Nose

- To "sniff" out problems
- If there is trouble in the air check it out For example problems with equipment – sometimes equipment becomes too hot. Or other types of problems that might occur might include personal problems between participants or people not understanding the content.

Use your Hands

- **Show expression.** Be natural about using your hands. They are a great way to show expression and emphasis.
- **Encourage participation.** An open hand is a non-verbal signal to encourage people to comment.
- **Provide positive reinforcement.** Sometimes a pat on the shoulder can be comforting.
- **Demonstrate procedures.** Hands are used to demonstrate procedures and processes.
- **Use media.** Of course you use your hands when using media.

Use your Feet

Moving around the training room is beneficial to both the participants and facilitators.

- **To encourage participation.** Moving towards a participant when they comment can encourage them to contribute. It makes you more accessible to the participants. Hiding behind a podium creates a barrier between you and the participants which creates a formal non-participatory training.
- **To ease nervousness.** Walking around can help ease nervousness and make you feel more relaxed in front of the participants.
- **To provide variety**. If you walk around, participants are looking in various places not always at one spot.
- **To manage the training.** Standing in front of a difficult person with your back to them can convey the message that you want to hear from other people. Standing by people who don't respond can encourage them to contribute

Moving around is good, but do not move around so much that it is distracting.

Use your Mind

- **Be adaptable and resourceful**. If problems arise, adapt to the situation and use your resourcefulness to handle the situation
- **Be creative.** Training can be fun or boring. It is up to you to bring it to life. Think of new and participatory ways to teach the content of the course.
- **Anticipate problems.** Think ahead to what problems might occur and determine possible solutions. This is part of having a back-up plan.
- Make positive situations out of negative ones. When problems occur make them learning situations.

Use your Heart

- Show respect. Participants come from many backgrounds and it is important as a facilitator that you show respect for all individuals. Even if you do not agree with them, you need to respect their point of view. If you set the tone of showing respect to all participants it will help them show respect for each other.
- **Recognize that everyone has their own style.** Not everyone will do things the same way or at the same pace. As a facilitator, it is important to show acceptance for different ways of doing things.
- Show support when people make mistakes. As adults we all get embarrassed when we make mistakes. By showing support for them in these situations you create a positive and safe learning environment.
- **Show compassion.** We all have problems and difficult situations. So it is important to show compassion for participant.

A Great Communicator

In conclusion, a great communicator needs to have:

- Smile of a pig pigs have a constant smile on their face.
- Eyes of a tiger tigers are extremely alert and can even see things in the dark
- Ears and nose of an elephant elephants have enormous ears and a giant nose that can sense things from miles away
- Hands of a monkey monkeys are very dexterous
- Feet of a gecko geckos have little suction cups on their feet to allow them to walk anywhere including up walls and on ceilings
- Mind of a fox foxes are very smart and very quick to adapt to situations
- Heart of a whale being the largest animal on earth whales also have the biggest heart
- Voice of a mockingbird Mocking birds have beautiful voices and sing many songs so there is variety in their voice.

Engage the Participants

Engaging participants in the training can be both challenging and rewarding. There are many training techniques that help participants stay engaged. For example:

- Create participatory learning situations
- Use a variety of:
 - Presentation styles
 - Media
 - Learning activities and exercises where they can apply the information
- Change the pace and activity (about every 20 minutes)
- Use examples that participants can relate to their jobs/situations
- **Use humor** (where appropriate)
- Use questions during your presentations

Use Questions to Engage the Participants

- Encourages all participants to contribute
- Allows for differences of opinions
- Encourages participants to share knowledge and experiences
- Keeps participants alert

Use Questions to Determine Participants Knowledge and Understanding

- Ask participants to explain complex issues
- Ask participants how they would apply information to their jobs
- Ask participants to repeat key content during reviews

There are three types of Questions

Closed-ended

A closed-ended question solicits a short, closed-ended answer such as "yes" or "no" or just a few words, and does not generate discussion by limiting what the participant says.

Examples

- Is it X or Y...
- Do you need ...
- Have you ever...

Benefits of using close-ended questions are that they can be used for a final answer, a conclusion, or for confirmation.

Limitations of using close ended questions are that they do not encourage very much participation

• Open-ended Questions

This type of question solicits descriptive answers and generates discussion. **Examples:**

• What are some ways...

- How can you do...
- Why would you want to...
- Tell me about...

Benefits of using open-ended questions are that they encourage the audience to participate, to share their ideas and experiences.

• Probing Questions

These are questions that probe for more information and ask participants to share their opinions or ideas about a subject.

Examples:

- Tell me more about...
- Could you explain...
- Would you elaborate..
- What would be an example...
- Anything else...

A benefit of using probing questions is that it encourages participants to share more details and go into greater depth.

Quiz: Name the type of question

- 1. How can trainers manage the training course?
- 2. What are some communication techniques you can use in training?
- 3. Tell me more about the techniques?
- 4. Have you ever dealt with a difficult participant before?

(Answers: 1. Open-ended, 2. Open-ended, 3. Probing, 4. Close-ended)

Use Questions Effectively

- Ask questions that focus on the "need to know" information
- Be sure not to embarrass participants by "putting them on the spot" with difficult questions they cannot answer
- Repeat questions and comments from participants to make sure that everyone in the room has heard them
- Give positive feedback when participants contribute
- If you do not know the answer ask participants to answer or state you don't know but you will find out

What Should you do When Participants Do Not Respond to a Question?

- Maintain a deliberate silence
- Repeat or rephrase the question or rephrase the question
- Use body language or eye contact to encourage participants to contribute
- Encourage answers with positive statements (Take your time. I know some of you have had experience with this and I would like to hear about your experience.)
- Give an example
- As a last resort, answer the question yourself if none of the participants answers.

How do you Elicit More from Participants after an Initial Response?

- Make a reflective statement giving a sense of what the participant said ("What I heard you say was....")
- Invite elaboration ("This is very interesting. Can you tell us more?")
- Encourage other participants to comment ("Can anyone else comment or add to that?")

Use Visual Aids Effectively

(Adapted from Witt Communications Inc.)

Visual aids are an aid to communication, not a substitute for it. To retain your relationship with the learners, don't let your visual aids upstage or overpower you. It is especially important and difficult to maintain the speaker-audience interaction while using slides or Power-Point presentations in a dimly lit room.

1. Plan your presentation before you create visual aids

Start by asking what you want the audience to do as a result of hearing your presentation. Then figure out what they need to know to do what you want them to do. Then create a simple outline that logically and clearly develops your main points. Finally, create visuals aids to support your message.

2. Use visual aids sparingly

They are aids to your presentation-not its sum and substance. Use them to highlight and support your key points.

3. Make visual aids visible to the entire audience

Projecting an image people can't see is as senseless as speaking so softly people can't hear.

4. Talk to the audience, not the visual aid

The 80/20 rule applies here. Look at the audience at least 80% of the time.

5. Avoid over-using laser pointers

Your aid should be so clear and easy for your audience to follow. Use laser pointers sparingly.

6. Explain the content of the visual aid when you first show it

As soon as you show people an object, they look at it-even if you're talking about something else. Don't make them divide their attention.

7. When you finish with the visual aid, remove it, cover it or turn it off.

Same as # 6

8. Limit the amount of material on any one visual aid

Use each slide to convey a single point. Bullet points-no more than fore to five per slide-should explain, illustrate, or substantiate that one point.

9. Avoid clip art from well-known sources.

It's almost always boring and amateurish.

10. Be prepared to give your presentation without your visual aids

Murphy's Law applies in spades to everything involving technology and an audience. Have a backup plan in case something goes wrong. Take a hard copy of you slides or an overhead projector and transparencies or prepared newsprint.