October 2011

Training Resource for Senior Corps Staff

Companion to Senior Corps Curricula

Facilitator's Guide

Corporation for NATIONAL & COMMUNITY SERVICE

Facilitator's Guide

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Companion to Senior Corps Curricula

Providing Independent Living Support:
Training for Senior Corps Volunteers

Supporting Children and Youth:
Mentor Training for Senior Corps Volunteers

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JBS International, Inc.
555 Airport Blvd. Suite 400
Burlingame, CA, 94010
Telephone: 650-373-4900

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Introduction

This Facilitator's Guide has been designed as a companion piece for Senior Corps project staff training volunteers using the *Providing Independent Living Support: Training for Senior Corps Volunteers curriculum* (ILS) and/or the *Supporting Children and Youth: Mentor Training for Senior Corps Volunteers curriculum* (SCY). Henceforth, these two resources will be collectively identified as "curricula." However, the Facilitator's Guide, with its expanded content, is useful in a variety of training situations. It will help you understand how to conduct group training successfully, either face-to-face or using distance learning, by equipping you with lots of tips, strategies, and ways to work with diverse participants. While it is geared toward the needs of new facilitators, even veterans may find practical advice for improving or refreshing their group facilitation skills.

As a facilitator, your job is immensely important. You are equipping volunteers to make extraordinary connections in their communities and change the quality of life for clients. The consequences of your efforts in building capacity among your volunteer force are far reaching. To get to that larger community impact, your goal as a facilitator is to develop a collaborative relationship with the volunteers who will be serving the community, one person at a time. As a facilitator, providing an empowering environment which supports learning rather than "feeding" the information to the participants is a key element of training and one that this Guide will help you accomplish.

To maximize its practical value, the Guide is organized into five topical chapters that lead you through the process of planning for, facilitating, and assessing a workshop or other training event. The chapters in turn are subdivided into sections introduced by a "*Frequently Asked Question."* The table of contents, therefore, can serve as a quick reference when you are looking for information or ideas on a particular training challenge. Here is an overview of what each of the Guide's chapters cover:

Chapter 1: **Logistics.** Once you decide to conduct a workshop and select the date, you need to think about the logistics. Figuring out the time and location and developing program announcements and materials come first. You will also have to think about how budget limitations, participants' schedules, local regulations, and any number of unanticipated conditions (even the weather!) might influence the success of the event.

Chapter 2: **Training Techniques and Application.** Getting familiar with the *content* of your workshop is important, of course, but this is only part of what you need to do to prepare yourself for a successful training. You will enhance your participants' learning by understanding and using training methodologies that address different learning styles, and adult learning theory, as well as effectively managing challenges that are commonly encountered in facilitating workshops.

Chapter 3: Group Management. Groups are made up of people who participate in training for a variety of reasons, have their own preconceived opinions and needs, and may come from different cultural backgrounds. You will receive information on how to create a safe learning environment, manage conflicts, and motivate and support your participants.

Chapter 4: Distance Learning and Web Conferencing. Distance learning technologies are quickly becoming a common approach to remote training or as a way to supplement face-to-face training. Review training technology considerations as well as the web conferencing practices that will keep participants engaged.

Chapter 5: Training Feedback and Facilitator Self-Assessment. In the interest of continuous improvement of your training event and training skills, you will want to find out what and how participants have learned from your event. Creating opportunities for participants to comment on their learning experiences, both during and after events, is crucial in gathering the information you will need for making future training decisions.

Chapter One: Logistics

Introduction

This chapter offers tips, suggestions, and tools to assist in planning for your training event.

1. *Is it possible for one person to do all of the planning and conduct the training, too?*

In theory, anything is possible, but we suggest that you do not try to do it alone! Here is a better way.

Step 1. Create a team. Recruit colleagues if they are available. If you are the only paid staff member available for the event, recruit a few energetic volunteers to be a part of your team; perhaps an experienced or enthusiastic Senior Corps volunteer, Advisory Council member or other community partner (e.g., volunteer station staff, teachers).

Step 2. Meet and agree on roles. Discuss what role each person on the team might be able to play. For instance:

- ✓ **Co-facilitator or assistant.** This person assists the main facilitator during the workshop sessions. Events are strengthened in many practical ways when someone else is available to help out.
  - The extra person is often useful for carrying out logistical tasks (such as setting up an easel or passing out material).
  - The event is usually also strengthened programmatically when the talents and experiences of two people contribute to it. The co-facilitator or assistant, for example, can provide intervention and support in challenging situations, or help the main facilitator judge the "vibe" of a group during a break so any necessary adjustments can be made promptly and confidently. The assistance can enrich the content by providing real examples from the field.
  - Both the facilitator and co-facilitator will likely find it easier to stay fresh, particularly during a long event, and by working harmoniously together, they will provide a useful model for participants of a successful collaboration.
- ✓ **Logistical coordinator.** Scheduling, managing site details, and communicating with participants before the event often call for a different skill set than those that may come naturally to a good facilitator. Recruiting a highly organized person who enjoys handling details like these can be a huge help.
- ✓ **Web or other material developer.** Likewise, creative talents may be found in another individual on the team to take responsibility for creating and managing information. For instance, depending on your volunteers and their preferred method to receive information, send out a flier or postcard, or post training publicity or workshop material information on the web or social media site (e.g., Facebook) for potential participants.

It is important to be realistic about your own abilities and interests, as successful events typically draw on a diverse set of talents from several individuals committed to the project. If there are some necessary things that you know you do not have the skills or, perhaps, time, to present, by all means try to recruit people who can do them efficiently and successfully. Your training will be stronger if you have the right mix of skills on your team, and each person feels like he or she has an important contribution to make to the training. Once you have your team together, meet to determine how to divide the work and decide on a project timeline.

Step 3. Check in regularly with your team. Depending on the length of a training event (e.g., several days of workshops or just one 90-minute session), you may want to meet several times ahead of the event, or simply stay in contact via phone and email.

TIP	***Find a co-facilitator*.** Although one person may do most of the facilitation of the session, a co-facilitator can help set-up, distribute materials during the session, respond to questions in a small break-out group or other program exercises, and provide timely insights to the main facilitator on any issues that come up.

Q 2. *What tools can I use to plan the logistics?*

A There are many tools that might be helpful, such as a timeline, action plan, or some other structured document, but drawing up a simple "To Do" list is essential for helping you get organized and ensuring everything gets done. Many very helpful tools are online (e.g., Google calendar) and will even alert you when you have a deadline coming up.

Step 1. Create a "To Do" List. In order to keep track of what must be accomplished and increase the probability of meeting deadlines, make a list of everything that needs to happen. See page 14 for a sample "To Do" list that you can adapt to your setting and particular training event or check out some online planning tools.

Step 2. Break it down. Break down your objectives into little steps and include a due date and name of person responsible for each step. This helps you get a handle on all the little details! Things are more likely to get done if the "To Do" list is flexible and the deadlines in it are reasonable. Track the tasks as you finish them (i.e. write in completion dates). Apart from the satisfaction of checking off the items on your "To Do" List, you can see how realistic your deadline dates were the next time you plan a similar training. Consider sharing the "To Do" list regularly with your team members as an online tool, in person or via email, whenever you update it.

Step 3. Keep a record. Use the *Logistic Planning Form* (page 13) to create a master record of the key pieces of information about your event (e.g., location and date, number of expected participants, and budget items—both estimated and actual) so you will have this information ready at hand as planning continues and for your post-training assessment. A "To Do" list or other notes may also serve as documentation; just make sure to keep a record for next time!

TIP	***Work backwards!*** In developing a "To Do" list, start with the date of the event itself and then work backwards to think of things that will need to happen to make the event possible, using a calendar to assign realistic dates to these activities. This will make the whole process smoother and more manageable.

TIP	***Consider using online planning tools (e.g., BaseCamp, Zoho, Google tools).*** These allow everyone access to the same information and the ability to contribute to the planning process. Make sure to orient the groups so that everyone is comfortable with the log on process and understand how to best use the site. Some of the tools are free and others cost, do check it out.

Q 3. *Where can I find space for our training?*

A Consider all your local resources:

✓ **Volunteer Stations.** Talk with your own Senior Corps volunteer sites.

✓ **Friends and Colleagues.** Contact colleagues from other non-profit and public organizations (e.g., 4-H Club conference centers, faith-based organizations and facilities, retreat centers, city parks and recreation department sites, state camping facilities).

✓ **Community groups.** Other good community resources include local libraries, community or senior centers, civic groups (e.g., Rotary, Toastmasters) and local museums.

✓ **Corporation partners or funders**. Consider approaching larger businesses in your community. Corporations often have training sites or conference rooms, and offering them on a space-available basis, either pro bono or at reduced cost, for training events is a great way for them to get community exposure and support the communities in which they are located. Sometimes they'll even throw in coffee or lunch.

✓ When taking stock of your available options for **training space**, consider the following **conditions**:

- **Atmosphere:** Does the site offer an environment suitable for your workshop material?

- **Convenience:** Is the site accessible for participants? Is parking available? Is public transportation nearby?
- **Size:** Is there enough space for participants to move around comfortably but not so much that the intimacy of the setting is lost?
- **Noise**: Is the site reasonably quiet, free of distracting outside noise (e.g., construction)?
- **Demonstration Space**: Is there a space to hang easel paper, or a blank wall (or pull-down screen) on which to project images?
- **Writing Space**: Will the participants have room to work on the exercises/worksheets? Will there be tables? What other set-up options exists?

TIP	***Large group.*** If your group is particularly big (too large for most local venues), you may want to consider calling your state tourism office or convention bureau for recommendations.

Q 4. *How should I arrange the training room?*

A Good question! The seating arrangement in the training room is important since it sends a powerful message about the kind of communication expected from participants. We suggest:

✓ **Try alternatives to classroom-style seating arrangements.** Placing the facilitator behind a lectern facing participants, particularly if seating is fixed as in a classroom, sends the unhelpful message that the facilitator is the only source of information, and discourages participant involvement. Round conference-type tables or a semi-circle of chairs, on the other hand, suggests equality of the facilitator and participants and encourages two-way conversations.

✓ **Seek flexible seating arrangements.** Since the curricula have incorporated multiple opportunities for small group or pair work, try to find seating that will make it relatively easy for participants to separate themselves as needed while still being able to work together comfortably.

✓ **Above all, avoid "king and court" seating.** Even in non-classroom seating arrangements, it is still possible to err by giving the facilitator a visually dominant position (i.e., by giving him/her a different or more comfortable chair).

TIP	***Change is possible.*** If a room is set up in a theater or classroom-type seating configuration not to your liking, but the chairs can be re-positioned, do not be afraid to move the chairs into small circles or one large circle. It is a good idea, however, to seek permission to make changes ahead of time with the management of the facility where the meeting is taking place. Check whether you are expected to return the room to its original set-up when you are done.

Q

5. How can I better accommodate participants with disabilities?

A

Good for you for thinking ahead on this! As participants confirm attendance, ensure that everyone has the accomodation that they need. Depending on our participants' needs, consider the following:

- ✓ **Visual Impairments.** Is there enough lighting in the training room? Is the font used in the program hand-outs too small? It is recommended that you use 12 point or an even larger font size (14 point). Avoid red font in PowerPoint.
- ✓ **Physical Impairments.** Can participants in wheelchairs, on crutches, or with other physical limitations easily access the training location? What about stairs? Does the facility have wheelchair ramps and elevators? Are bathrooms and break areas also easily accessible? In the training room itself, make sure there are no unnecessary barriers blocking pathways and doors.
- ✓ **Hearing Impairments**. How are the acoustics in the training room? Will you need a microphone? Are there other auditory distractions? Trying to train over a construction project next door can be disastrous. Do you need a sign language interpreter? If so, make sure the interpreter is visible to those with the need? Make sure that your face is visible to the group and that you are not holding your hand or microphone directly over your mouth. Speak up and slow down. Test your volume. If you talk softly, use a microphone. Restate any questions that come from the group so that everyone can hear them. Everyone will appreciate this.

TIP	***Survey before training.*** If you do not already know the needs of your audience, it is a good idea to survey your participants prior to the training to determine specific special needs requirements. To evaluate your proposed training facility, consider using the Accessibility Checklist provided by Access AmeriCorps. http://www.ucp.org/ucp_generaldoc.cfm/1/6619/6621/6621-6621/1417.

Q ***6.*** **How many breaks will participants need? Do I need to feed them*?***

A This really depends on the length of your training.

- ✓ **Breaks.** Older volunteers may appreciate breaks every 45-60 minutes in order to move around, especially if they have experience physical impairments, such as arthritis. Other obvious reasons that participants require periodic breaks include needing to use the restroom, take medicines, or make phone calls. Breaks also provide participants with an opportunity to re-energize, ask the facilitator questions informally, think about the material, and converse with one another. They are important in building a sense of community among your volunteers. Participants should also be encouraged to take care of themselves by taking a break as needed.

TIP	***Break Time:*** 15 minute breaks are common and you will want to add them to your schedule. Directing the group to start the break after they have completed a task (worksheet, exercise) is a way to handle individual pace differences. For larger meetings, where networking is also a goal, consider 30 minute breaks. You may need to plan on additional time to "herd" the group back into the meeting room, usually another 5 minutes, depending on its distance from the break location.

- ✓ **Food.** Like breaks, participants have practical needs for food. Hunger is obviously distracting to learning and full participation by participants. Well-chosen food can help make participants feel welcome and comfortable. "Breaking bread together" encourages both learning and relationship building. We recommend that you provide a selection of beverages (e.g., coffee, tea, water, juices) and some simple, and ideally, healthy snacks (e.g., fruit, cheese and crackers, and yes, pastries) during your breaks. If you are training for a full day, you would typically include both morning and afternoon snacks and a break for lunch, which might be "on the house" or on a "you-are-on-your-own-for-lunch" basis, as finances allow. For events that begin in the morning or late afternoon consider inviting participants for coffee/tea a little ahead of the meeting time as an incentive to ensure on-time arrivals and a wide awake audience!
- ✓ **Food and Cost.** Food is costly, particularly for large groups, and needs to be budgeted for and delivered to the meeting site at the appropriate time. But before rejecting an event-sponsored lunch as too costly, consider options for obtaining donated or discounted food for your all-day event.

TIP	***Free food.*** You might be able to get a local grocery store or restaurant to donate food for your training. Be sure to give them appropriate credit at the event. It is good public relations for them! Don't forget to send a thank you note and consider thanking them publicly in a newsletter or on your website, if you have one. Also, encourage participants to take home leftovers to enjoy later!

Q 7. *What supplies and equipment should I consider?*

A This is where your "To-Do" List comes in handy (see page 14). You may need:

- ✓ **Easel paper/easel pads with an easel stand:** These supplies are practically essential for posting information and tracking key content and discussion. Chalkboards or whiteboards can be used as alternatives, but be sure appropriate writing instruments (chalk or erasable marker pens) are available for use on (or, better, before) the meeting day. Chalkboards and whiteboards have the disadvantage of limited display space (notes that need to be erased for more space cannot be reviewed during the training), nor can their contents be taken back to the office after the training to be typed up for review and preservation. Although, if someone is typing up the notes as you go that will help. Easel pad pages, however, offer note display space, limited chiefly by the available space for hanging them in the room, and a permanent record for later use (which can also be typed). You can also prepare easel pages with key points ahead of time.
- ✓ **Markers**: You will probably want a couple of boxes of markers. Be sure you have several dark (black/blue) markers, since other colors are often less visible, especially if the group is large, and use the other colors for editing or highlighting. Use two colors and rotate use with every other line to help participants keep track. You may need additional sets of markers if you are planning to have small group activities that ask participants to draw or report their own information. If you are using whiteboards, be sure to use the special erasable markers designed for their use so as not to permanently damage a meeting site's property. Unfortunately, they are virtually identical in appearance to the more common permanent markers. Check each marker to be sure!
- ✓ **Masking tape:** Check to see if your easel paper is of the self-sticking "Post-It" kind. Although more costly, this type is designed to be attached to a variety of surfaces without the need for masking tape or risk of damaging surfaces or furniture in a meeting room. If this type is not available to you, you will need to bring a roll or more of masking tape or blue painter's tape (or tacks if the surface is fabric) to attach easel pages to an available surface. Many training facilities, however, disallow using tape on walls, so be sure to ask ahead of time about such restrictions. You may still be allowed to post pages on windows, wood doors or in other designated areas.

✓ **Audiovisual equipment.** While PowerPoint is provided along with many curricula, this is not a requirement for quality training delivery. You can make do with easel paper for presentations. For years, many effective events have been presented with just these simple means. However, if you choose to use audiovisual, read on:

- **Microsoft PowerPoint:** PowerPoint presentations may be helpful and an effective way of visually conveying one-way information, however, the medium does not lend itself to dialogue or discussion. PowerPoint is an instructional tool, not a way to promote discussions. Using PowerPoint also requires substantial investment in or at least access to some still fairly expensive audiovisual technology, above all, a laptop computer from which to run the software and an LCD projector with which to display it. A very large projection screen is also helpful, although a light-colored blank wall will usually offer good results as well. You will also need the necessary power cables, and perhaps an extension cord for the laptop and the LCD, and the video cable that connects the two components. These are usually sold and packed with these audiovisual components, but check ahead of time to make sure they have not been separated and left behind at another location. Usually, the show cannot go on without them!

T I P	***PowerPoint handouts.*** Many participants expect a hard copy of the slides from a PowerPoint. If you are unable to convince the group to receive an email with the PowerPoint (point out the need to save trees!) and you decide to make copies, consider two slides per page to retain large type and print back-to-back.

- **Assistance from the training location:** Some meeting locations are already well set up with all the necessary audiovisual equipment to produce PowerPoint and other visual presentations except (usually) the laptop computer itself. If you do not own or have access to the equipment yourself, it is worth making an inquiry with the meeting location sponsor. Sometimes this equipment is kept in a well-stocked meeting room. In other cases, you will need to reserve the equipment ahead of time and arrange to have it brought to the meeting room on the meeting date.
- **Overhead projector:** If you have no access to an LCD projector and/or laptop, there are some older (but rapidly disappearing) display technologies that might be available to you locally as alternatives. These include making transparencies that can be displayed on overhead projectors. Even if available, this technology requires some additional preparation time and work (e.g., to take and print key PowerPoint slides as overhead transparencies) that are likely to make it impractical.

! Technology cautions. Be careful when relying on audiovisual technology for your presentations.

- Make sure you (or someone with you) understand how to set up the equipment and troubleshoot at least the most common problems. It is a very good idea, in fact, to visit your meeting site ahead of time to test out the equipment and check on things like drop-down screens (or available blank walls), electrical outlets (and their distance from the equipment), and the ability to darken the room.
- Increasingly, LCD projectors do not require darkened rooms for presentations to be visible, though older models may still require some ability to control room light. If the room must be darkened, this will intensify the conversation-dampening effects of PowerPoint presentations. Presentations in darkened rooms should be avoided during low energy times for participants (e.g., right after lunch or late in the afternoon) because of their sleep-inducing effects!
- Be aware of the Mac and PC computer compatibility. There is a special converter required for LCD projectors.

✓ **Special equipment.** Be prepared and have the required equipment and supplies needed for the module, such as handouts, books, or props (e.g., balloons or balls for an activity). Any suggested equipment or handouts is listed in each module of the curricula.

TIP	***Advance Preparation.*** Be sure to arrange all needed equipment and materials well in advance of the training. Consider preparing some of your easel paper before the training (e.g., objectives, major points, group instructions). Audiovisual equipment in particular needs to be tried out ahead of time, ideally at the meeting site itself.

TIP	***Love technology?*** For those of you who have access to and love technology, consider using your digital or video recorder to tape some of the exercises. *You will want to be sure to obtain participants' oral (or better, written) consent to audio or audiovisual taping.* You can use the tapes to critique participants' skills development or your own facilitator skills, or lend to a participant who missed the training!

Q

8. How do I *make* sure everyone is aware of the training information?

A

Keeping your participants informed before and after training is important and more easily accomplished than ever before.

Before a training. Use your Senior Corps listserv, website and/or social media (Facebook, Twitter, Wikispaces) to keep participants in the information loop about up-coming training including dates, locations, description of the training and any registration instructions and deadlines. Create a buzz by blogging about the training! You may even want to post or e-mail materials to participants beforehand in preparation for the training. In addition to supporting participants in being better prepared to engage during the training, this allows you to minimize the number of handouts during the training and ensure that participants are not overwhelmed with paper during the training. Make sure that all potential participants can be reached via e-mail/Internet or you may end up limiting your target population. You may want to consider a snail mail option as well.

After the training. Participants may still want to know how to access a mentioned resource or get a copy of PowerPoint slides or the summary of group discussion. Post the link to a website or Facebook page during the training or send out documents via email to interested participants as part of the follow-up. Make sure to post any promised documents (handouts, discussion summaries) within a few days after the training.

TIP	***Recognition.*** Sometimes participants like to have something in writing that recognizes their effort toward improving their skills. You may want to distribute "certificates of completion" to volunteers that completed one of the modules or a series of sessions. A sample certificate of completion that you can adapt is included in the additional materials and resources at the end of this chapter.

References & Additional Resources

- American Society for Training and Development is a professional organization for those who train and facilitate adults, especially in business settings. There are lots of resources available on their site. www.astd.org
- Mosaica. *Starting Strong: A Guide to Pre-Service Training.* Santa Cruz, CA: National Service Resource Center/ETR Associates, 1996. This guide includes information on such topics as: developing a pre-service training plan/package, evaluating pre-service training, leadership and self-understanding, working effectively in groups, diversity and multiculturalism, and community-based skills. http://www.nationalserviceresources.org/files/legacy/filemanager/download/454/a.toc.pdf

  http://nationalserviceresources.org/pre-service-training
- United Cerebral Palsy is a professional organization that has specific resources regarding accessibility issues. www.ucp.org
- Useful guides to the kinds of LCD projectors best suited for use in particular kinds of presentation settings such as conference rooms, churches, and private homes may be found at:www.projectorpeople.com
- The National Service Inclusion Project can be found at the Institute for Community Inclusion at the University of Massachusetts–Boston (Corporation T/TA provider) http://www.serviceandinclusion.org
- American Association of the Deaf-Blind (AADB) is a national consumer organization of, by, and for deaf-blind Americans and their supporters. Access to information and resources can be found at www.aadb.org.

Additional Materials and Resources

Chapter 1: Logistics

1. **Logistics Planning Form**
2. **Sample Logistical "To Do" Checklist**
3. **Sample Notice for Workshop (*Providing Independent Living Support*, *Module 3)***
4. **Sample Certificate of Completion *(Serving Children and Youth, Module 7)***

Logistics Planning Form

Training Date(s)		Length/Time	
Facility		Location	
Participant #	Anticipated #		
	Actual #	Facilitator	
Lodging for participants/guests			

Special Activities requiring early attention:			
☐	☐	☐	☐
☐	☐	☐	☐

Special Arrangements (e.g., medical care, disability access, child care, visitors)			
☐	☐	☐	☐
☐	☐	☐	☐

Supplies (e.g., easel pads, markers, tape, audiovisual equipment, etc.)			
☐	☐	☐	☐
☐	☐	☐	☐
☐	☐	☐	☐

BUDGET	**Anticipated**	**Actual**
Facility/meeting room		
Lodging		
Meals/Snacks		
Materials		
Audio Visual		
Other:		

Notes (Lessons learned, issues):

Sample Logistical "To Do" Checklist [1]

To Do	Person Responsible	Deadline Date	Completion ☑
TRAINING MATERIALS			
Order/purchase supplies (easel pads, markers, masking tape, pens, paper, etc.).			☐
Finalize training agenda.			☐
Duplicate any materials needed.			☐
Prepare materials transportation to site.			☐
Prepare easel paper/easel sheets.			☐
Transport training supplies to site.			☐
FACILITY ARRANGEMENTS			
Determine disability needs.			☐
Identify and visit potential sites.			☐
Select site.			☐
Confirm firm costs and facility billing arrangements.			☐
Sign contract with facility.[2]			☐
Reserve training room space.			☐
Confirm training room arrangements with facility.			☐
Determine audio-visual equipment needs, if any.			☐
Arrange audio-visual equipment acquisition.			☐
Arrange meals/refreshments/special dietary needs.			☐
Arrange participant check-in/out process.			☐
Determine on-site office services needed (e.g., copying, computer access).			☐
PARTICIPANT ARRANGEMENTS			
Send participants first notice of training ("Save the date!")			☐
Send host sites/collaborating agencies/facilitators, presenters, and guests first training notice.			☐
Prepare detailed information for participants (e.g., flyer).			☐

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[1] Adapted from MOSAICA Logistical Arrangement Checklist.
[2] Even for donated space, it is wise to get a written document noting any expectations and responsibilities (e.g. clean-up, use of equipment)

To Do	Person Responsible	Deadline Date	Completion ☑
Send host sites/collaborating agencies/facilitators/ presenters/participants detailed instructions.			☐
Obtain lodging and training room requirements from participants.			☐
Prepare lodging lists for participant arrival.			☐
FACILITATOR AND TRAINING ROOM ARRANGEMENT CHECK-IN			
Select facilitator/presenter.			☐
Obtain lodging and training room requirements from facilitators.			☐
Arrange training room seating.			☐
Review session materials.			☐
Make any agenda adjustments as needed.			☐
Check that materials/supplies are in training room.			☐
Check that audiovisual equipment is available.			☐
Check that refreshments are available.			☐
Check that room temperatures are comfortable and be sure you understand how to adjust them.			☐
Locate light switches and power outlets.			☐
Confirm/check in with presenters.			☐
Confirm number of people at meals.			☐
Ensure evaluation forms are available as well as determine a location to collect them.			☐
END OF TRAINING			
Do a final walk-through of facility to locate equipment, materials, and personal belongings.			☐
Collect completed evaluation materials.			☐
Debrief with key individuals/team.			☐
POST TRAINING / FOLLOW-UP			
Check, record, pay bills for all aspects of training.			☐
Send thank you notes sent to presenters, guests, sponsors, team, and others who helped.			☐
Tally and analyze evaluation responses.			☐
Share session notes and/or evaluation results with participants, collaborating partners, presenters.			☐
Complete any promised follow-up.			☐
Document agenda/materials changes for future use.			☐

Sample Notice for Workshop

(This sample notice is for the Module 3 workshop, ILS)

Understanding the Physical, Emotional, and Social Challenges Experienced by Clients

Location:
Date:
Time:
Cost:
What To Bring:

Training for Independent Living Services
Benefits of Service to Volunteers

Trainer:_______
Date: _______

There are many challenges faced by homebound, frail clients, including loss or limitations around mobility, self-care, activities of daily living, and companionship. This 60-75 minute workshop will describe some of these issues and offer tips for volunteers to better deal with these issues and assist their clients.

Program Name

Workshop Address
Your Address Line 2
Your Address Line 3
Directions to Facility

Phone: 555-555-5555
Fax: 555-555-5555
E-mail: someone@example.com

Sample Certificate of Completion

(sample certificate for Module 7, SCY)

Certificate of Completion

Presented to

Ms. Estelle Hawkins

Serving Preschool Children (Ages 3-5)

Serving Children and Youth:

Mentor Training for Senior Corps Volunteers

Signature

Date

Chapter Two: Adult Learning, Training Techniques and Application

Introduction

Being familiar with the content of your workshop is only part of what is needed to conduct a successful training. It is equally important to be able to identify and use the best training techniques to enhance the learning environment for participants. The two curricula expressly created for Senior Corps (*Providing Independent Living Support* and *Supporting Children and Youth* curricula), along with many other trainings, are specifically crafted for small-group learning, supported by a variety of facilitation techniques. The workshop modules can be led by those with a minimum of facilitation and training experience as well as by those with years of experience. Each module provides activities and information that will help participants discover key insights through reflection, participation, and experience.

This chapter provides a broad overview of time-tested techniques to help you prepare for training. It will help you appreciate the unique characteristics of adult learners, recognize participants' different learning styles, understand the approaches utilized in the curricula, and deal with challenges frequently encountered in facilitating training events.

1. What do I need to do to get ready?

Facilitators are asked to do three important things to prepare for training: be diligent, create a safe and productive environment, and keep laughter and play alive.

Step 1. Be diligent – Know your material! This means reading the curricula modules carefully at least a week ahead of time, taking the time needed to understand content and the underlying intent, and noting the instructions for "Session Preparations" found at the beginning of each module. Reading should include:

- ✓ **The module text** including agenda, tips and the list of hand-outs
- ✓ **PowerPoint** slides for the module
- ✓ **Handouts** for the module

Step 2. Create a safe and productive environment. Physically, make sure the space is set up and all materials are copied and organized. (See *Chapter 1 – Logistics,* To-Do list). Do your best to encourage and sustain a workshop environment that promotes exploration by participants and their full engagement in the learning process. *Chapter 3, Group Management*, will provide you with practical steps on how to build group cohesion and support.

TIP	***Just take a breath.*** Before beginning training, mentally prepare yourself by practicing your own calming regimen or spiritual practice.

Step 3. Keep laughter and play alive. Think ahead! Incorporating humor and play into the workshop is important since you may be dealing with serious topics. During discussions of serious topics; such as dementia of the elderly clients, handling grief of clients experiencing loss, or the temper tantrum of a frustrated child; humor helps to keep people from getting overwhelmed or depressed. You can incorporate humor to emphasize important points by using funny stories, jokes, or simple games. It is important, however, to be careful not to use humor in negative ways (e.g., sarcasm or put-downs of clients).

TIP	***Keep learning.*** Once you have completed the workshop, take time to consider what participants have told you about their experience. Talk with your assistant facilitator or other members of your team present at the event to discuss ways to improve next time. Chapter 5, *Training Evaluation and Self-Assessment*, provides some suggestions on how to do this efficiently and effectively.

Q 2. *What is a learning style and why is that something I need to know?*

A "I hear and I forget. I see and I remember. I do and I understand."
~Confucius

This saying of Confucius not only identifies three key learning styles—auditory, visual, and tactile/kinesthetic (through physical interaction)—it also usefully ranks them by effectiveness. It is a reminder that interacting with material is very crucial to learning. Some people with excellent memories find listening to a lecture or hearing an illustrative story is sufficient for them to understand new ideas. Others need to see and study something in writing to be able to remember it. Still others find they can only truly learn, remember, and understand something new by actually putting it to use. And learning styles are not mutually exclusive. Many people learn in several ways, and find their understanding reinforced by interacting with new materials in multiple ways. By being aware of different learning styles you will better understand why some people understand the material presented one way but not in another way, and why a diversity of strategies is important for everyone.

These varied learning styles informed the development of the curricula. Each module uses a mix of formats and activities to accommodate multiple learning styles and to make the training process as inclusive as possible. Commitment to an interactive process will help keep you from becoming just a "talking head"—as we all have on occasion. You want to avoid the idea of, "give them (the participants) the material" without seeking their engagement.

Although learning happens through all three of the primary learning styles, each person tends to process most dependably through one (or perhaps two) of them.

- ✓ **Visual Learners learn *through seeing*.** People who are primarily visual learners need to see in order to understand. Typically, these kinds of learners will benefit from visual presentations, such as diagrams, charts, and handouts. They may even pick up useful cues from the facilitator's body language and facial expressions. They tend to prefer sitting at the front of a group to avoid line-of-sight obstructions (i.e., people's heads!) so they do not miss anything visually. They often like to take detailed notes to absorb the information being presented**.**
- ✓ **Auditory Learners *learn through listening.*** People who are auditory learners need to be able to listen in order to understand. Typically, this learner will be helped with verbal lectures, discussions, and even the underlying meanings of speech through tone of voice, pitch, speed, and other nuances.
- ✓ **Tactile/Kinesthetic Learners *learn through, moving, doing, and touching.*** People who are tactile (small motor skills) or kinesthetic (large motor skills) learners need to be able to use a hands-on approach to explore the content of the information, either through movement or touching materials. These learners often find it difficult to sit still for long periods of exclusively auditory learning (i.e., straight lecturing) and may become distracted by their need for activity and exploration.

TIP	***Try to employ multiple learning styles at one time.*** Write notes on easel paper (or have an assistant write them), for example, or show a relevant PowerPoint slide to provide visual cues when relying on auditory styles of learning.

Q 3. *How do I best get the information across to my mixed crowd of learners?*

A The simple answer is, by using a mix of methods!

The *Independent Living* and *Supporting Children and Youth Curricula* use experiential learning methods, cooperative groups, and a variety of activities and formats to support different learning styles.

- ✓ **Lecture/lecturette.** This is a short (less than 20 minutes) verbal presentation designed to provide quick, basic information related to the subject matter of the module. There is an example in every module, and they are great for auditory learners.
- ✓ **Large Group Call Out/Report.** Using this method, the facilitator poses a question, and then invites responses from the entire group. By noting responses on an easel pad

or chalkboard, the facilitator can make this an effective technique for both visual and auditory learners. It also provides the facilitator with a quick, ongoing assessment of the group's understanding of the module's content. It works well as a training session continues, but may be more challenging to use early in a session unless participants have some familiarity with the module's content and each other. An example can be found in every module.

- ✓ **Brainstorming.** When this method is used, participants are asked to come up with ideas related to a specific issue or problem. This can be done either in a large or small group. This is a great technique for participant problem-solving, sharing experiences, and developing a common basis of knowledge. Remind participants: no critiquing!
- ✓ **Worksheets/Checklists**. Used throughout the curricula, visual or task-oriented learners will love these tools as they provide opportunities to reinforce and transfer learning. They focus on understanding a particular problem on an abstract level (worksheet) or unpacking a task or intervention sequentially over time and applying it to a concrete example (checklist).
- ✓ **Individual Reflection/Self-assessment.** This method can be employed either by individuals working on paper alone or in pairs, or small groups writing their ideas down after discussions. It offers a great opportunity for participants to self-assess their understanding of the material and their ability to transfer insights from learning to application to their individual situations. An example can be found in almost every module.
- ✓ **Case Studies/Scenarios.** A description of a possible course of action (scenario) or detailed account of a person or situation (case study) offers participants the opportunity to explore real life events. This can be done in large or small groups and is useful for problem-solving, sharing experiences, and application of newly-learned materials. Scenarios are found in Module 3 (ILS).
- ✓ **Role-play.** Asking participant volunteers to try acting out a particular role (e.g., a client or a helper) can be a particularly effective tool for promoting empathy and refining intervention skills. You will need to prepare the group carefully to be able to do this successfully, as some individuals have difficulty handling this approach.

The curricula provide detailed instructions for the facilitator to guide him/her on all exercises or interactive segments in the module.

4. *How will I be able to facilitate all of the exercises and interactive segments in the modules?*

The curricula provide detailed instructions for the facilitator to guide him/her on all exercises or interactive segments in the module.

Step 1. Read the instructions in advance. Make sure you understand what the participants are asked to do.

Step 2. Keep it simple. Open with one-sentence descriptions of the exercise and its purpose. This provides the participants with a framework for what they should expect to gain from the exercise.

Step 3. Practice. Become familiar with and practice the key content points (lecturette) that reinforce activities and exercises along with the instructions.

Step 4. Debrief. Debriefing is the process of reflecting on the experience. It allows participants to articulate and integrate what they have learned from an exercise and to learn from each other. In general, allow the same amount of time for the debriefing as with the exercise or activity. Given that this is a key time to make connections and strengthen peer sharing and learning, you will not want to short-change this process. After the exercise, ask individuals and/or groups to report out using the questions suggested in the module or those in the "TIP: Debriefing." box below. Do not hurry on to the next agenda item if you encounter silence; pause and allow participants time to react.

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Debriefing. Instead of asking a single, all-encompassing question such as "What did you learn from the exercise?" try a three-part debriefing using questions appropriate to these categories:
a. Notice: "What did you feel, see, and/or hear?" This question elicits participants' observations without asking them to draw conclusions.
b. Learning: "What new discovery did you make?" Depending on the exercise, the module may pose more specific learning questions. This question encourages participants to share their growth or new knowledge with one another.
c. Application: "How can you apply what you learned to your life and to your work with the elderly (or child)?" This question gives participants an opportunity to reflect on how to make the material more immediately relevant.
Take at least five minutes for each part of the debriefing.
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Step 5. Summarize learning. Reinforce what participants just learned by including their contributions in your comments or lecturette. Add any information from the module that was not mentioned by the participants.

T I P	***Ask for clarification.*** When a participant shares something that is unclear during a debriefing, try not to jump in with an attempt at clarification of what the participant has said. Instead, use a question to gather more information. For instance, ask the participant, "*Can you say more about that?*" The participant will often provide the necessary clarification of meaning on his/her own.

Step 6. **Keep the flow.** Create connections between different segments of the training so participants can move smoothly through the workshop and not feel disjointed or jarred when a new agenda item is introduced. You can build bridges between the segments by reiterating previous material and connecting it to the new exercise or issue.

Q 5. *What can I do if my audience has limited English or is low literacy?*

A Senior Corps volunteers represent a variety of education, ethnic, socio-economic, language and cultural groups. Sometimes you may see the range of diversity of the volunteer pool at one of your trainings! There are ways to address the limited English or low literacy volunteer group; consider the following:

- ✓ **Keep it simple.** Put all call-out questions you are going to ask (e.g. warm up) on separate PowerPoint slides or easel paper – one per slide/pad. This will focus the conversation and help folks with limited English or literacy see as well as hear the questions. Remember, by offering a variety of ways to experience (hear, see) English, you will increase the understanding of the non-native English speaker.
- ✓ **Get help.** If folks don't speak English, and you have a volunteer or colleague who can help with translation, ask them to help translate a few key questions or key items in the handouts. When you hand out language appropriate materials beforehand, you support greater participation by those volunteers. Some programs have volunteers from a language group at a table together so stronger English language speakers can interpret, if needed.
- ✓ **Offer opportunities for self expression which don't involve talking or writing.** When you ask participants to consider a next step or reflect on an aspect they have learned, instead of asking them to write, provide supplies and encourage them to express themselves through art. Participants who don't usually feel comfortable speaking up or writing may feel more included if they can express themselves in another way. Sometimes the art itself helps participants articulate their perspective as they use their art to explain their thoughts. Some possible supplies to include: pipe cleaners, crayons, colored pencils, markers, paper, newspaper, photographs, or glue stick.

6. *What do I need to know about adult learning to help me train my Senior Corps volunteers for service?*

Learning for adults is different than learning for children and teens. Adult learning needs to be thought about and structured differently from traditional classroom teaching.

What we know about adult learners:

- ✓ Adult learners come to learning with a wide range of previous experiences, knowledge, self-direction, interests, and competencies. They have been around! You will keep boredom and frustration to a minimum by integrating the experiences and skills that already exist in your group.
- ✓ They are *autonomous* and *self-directed.* Try to give opportunities for learners to learn on their own, perhaps sending materials ahead of time or sharing with groups what they already know about a topic before starting. This also keeps you focused on what you need to teach rather than on what they already know.
- ✓ They have accumulated a foundation of *life experiences* and *knowledge* that may include work-related activities, family responsibilities, and previous education. In a workshop setting, they need to connect those experiences to the content presented. For example, if you are talking about conflict resolution, even if they do not have experience with your particular population, they probably know some important ways about how to resolve conflicts.
- ✓ Although adult learners tend to have a problem-centered orientation to learning, they are also *goal-oriented, relevancy-oriented, and practical.* They need to answer the question, "How is this information/exercise going to help me with the client?"
- ✓ Adults have established values, beliefs, and opinions. They need time to accommodate new or different information.
- ✓ Additionally, an adult learner's ego may get involved and they may be defensive if they believe their competence is being questioned. This is especially important to remember if you are trying to change an ingrained habit. For example, encouraging volunteers to ask "what" or "how" questions of children/youth instead of "why" questions.

TIP	***Model respect.*** Demonstrate respect for differing beliefs, religions, value systems, and lifestyles. Let your participants know that they are entitled to their values, beliefs and opinions, but that everyone in the room may not hare their beliefs. Allow debate and challenge of ideas.

Given what we know, steps for successful adult learning application:

Step 1. Connect. A concept needs to be "anchored" or explained from more than one set of values and appeal to different life stages. It is helpful for you to understand the general history of participants so you can connect the new learning to previous knowledge or experience. Tapping into their experiences can be a major source of enrichment to the training. Example: "*You mentioned some useful ways you help your hearing impaired friends and family, another one is…"*

TIP	***Give up total control.*** Share control with participants over the "what, who, how, why, when, and where" of their learning. Provide opportunities for participants to offer their input and adjust your training to reflect their interests.

Step 2. Support. Transfer of learning for adults is not automatic. Coaching and other kinds of follow-up support are needed to help adult learners transfer learning into daily practice so that it is sustained.[3] Support comes not just from the facilitator/project director but also from peers. Structure learning to include support from peers.

- **Face-to-face interaction.** Provide opportunities for dialogue within the group and strengthen working relationships with peers. Facilitate small-group activities to move them beyond understanding to application, analysis, and evaluation. Small-group activities provide an opportunity to share, reflect, check understanding, connect learning to past learning experiences, and generalize learning.

Step 3. Integrate. Adults need to be able to integrate new ideas with what they already know if they are going to retain—and use—the new information. Be patient. Information that conflicts sharply with what is already held to be true or has little "conceptual overlap" with what is already known is integrated more slowly.

Step 4. Apply. Emphasize how learning can be applied in real life and relate activities to a setting familiar to participants. Adults generally want to immediately apply new information or skills to current problems or situations. Create opportunities for participants to think about interactions, thoughts, and behavior in light of their volunteer assignments. An application of this tenet is the use of reflection and "next step" worksheets administered during the modules.

[3] Speck, M. (1996, Spring). *Best practice in professional development for sustained educational change*. ERS Spectrum, 33-41.

7. *If I want to know more about learning theories, where do I start?*

Congratulations on your desire to expand your knowledge! Below are three key learning theories you may want to investigate. Familiarity with learning theories will help you better understand how the modules have been designed. Here is a brief overview of three:

Transformational Learning Theory[4]

People can be transformed through a reflection process.

In other words, learners need to be able to think about the meaning of their own experience rather than focusing purely on outside information. For example, after presenting statistics, invite participants to share relevant anecdotes from their experiences that illustrate the concept behind the numbers. At the same time, "disorienting dilemmas" are learning situations that do not fit one's own thinking and experience (see text box). Guiding learners through these dilemmas will prompt critical reflection and assist learners to develop new ways to interpret experiences and integrate them.

Scenario: Example of a "Disorientating Dilemma"
You bring up the "Golden Rule"—"Do unto others as you would have done unto you."—as an opportunity to test an iron clad assumption as it pertains to service.

Facilitator: *The Golden Rule: How many of you believe in it? Ok, let's say that you feel comfortable with someone helping you to put your coat on. In fact, you like it. Can you assume that your clients feel the same way? Why not? Maria said it is more like, "Do unto others as they would do to themselves." Now, what do you do?*

Juana: *It seems like it is probably best to ask your client how he might want to be helped.*

[4] Mezirow, J. (1991). *Transformative Dimensions of Adult Learning.* Jossey-Bass, Inc.: San Francisco, CA.

Cooperative Learning Theory[5]

Small groups of learners with different ability levels use activities to understand a subject.

According to this theory, it is important that each participant be responsible both for learning what is taught and also helping teach other participants. For example, if a small group is asked to think of ways to apply a concept when working with a fearful client, all participants are responsible for sharing ideas and experiences in order to help each other be successful. This theory reinforces the need for providing adequate time for small group activities. Cooperative Learning Theory recognizes that new skills and behaviors are achieved through self and small group contributions.

Experiential Learning Theory[6]

Engage learners in direct experiences in order to increase knowledge, develop skills, and clarify values.

In Experiential Learning, the facilitator provides a process where learners are actively involved in posing questions, investigating, experimenting, solving problems creatively, and assuming responsibility for learning. For example, a role-play allows participants to practice actually saying the words, consider the feeling, and try out behaviors.

For more information, see the *References and Additional Resources* on page 31.

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8. What if the module (activity, reflection) is not working for the participants?

A It is not always easy to tell what the problem is. Take stock of the training **content, process** and your **participants** and adjust accordingly. Consider whether you have done all of the following:

Content:

- ✓ **Check in with the group on their comfort level in the content area**. Even the most expert among the group can learn something new; however, if several individuals in the group voice concerns about already covering the material, consider using those peers as "experts." Can they help co-present or add to the content? If the topic seems to be mastered by the group, move on or deepen the discussion.
- ✓ **Limit information overload**. People can only absorb so much new information, no matter how interesting and relevant it is to them. A common mistake facilitators make is to try to cram too much information into one presentation, which minimizes time for participation or experiential learning, and can lead participants to feel overwhelmed with information. Identify a limited number of major points that need to be made or skills that need to be practiced. If your group becomes fatigued, take

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5 Johnson, R. & Johnson, D. (2001). *Cooperative Learning.* http://www.clcrc.com/pages/cl.html

6 Association for Experiential Education (2006). www.aee.org

a break or do an energizer activity. Give yourself a moment to regroup strategically while participants rest and enjoy an opportunity to interact among themselves informally.

Process:

- ✓ **Provide clear communication and direction.** Facilitators need to communicate training objectives or exercise instructions clearly so participants can understand them. Be sure to check for understanding before turning them loose. If you have not done this adequately, try again to clarify the purpose (e.g., sharing of information, skill development, etc.) of the exercise to get participants back on track.
- ✓ **Honor the mix of methods.** The curricula have built in a mix of lecturettes to convey content and experiential activities to build knowledge and skills. Experiential methods need to be given adequate time to maximize participants' attention and retention. Because bringing participants together is expensive and time is limited, you may be tempted to devote most of the available time to lecturing in order to provide them with as much content as possible. Resist this temptation, as it will not work. You will lose the group. They will be less engaged, have lower retention, and their satisfaction will be reduced.
- ✓ **Be selective with audiovisuals.** The curricula come with simple PowerPoint slide presentations. However, PowerPoint is not always the best tool. As mentioned in Chapter 1, PowerPoint presentations are useful primarily for one-way communication of information. They do not readily promote discussions or dialogue. If you find that PowerPoint slide presentations put your group "to sleep," do not use them. Room conditions (size, lighting, obstructed lines of sight) can likewise affect potentially worthwhile visual tools, even easel pads, and become more of a source of audience frustration than an advantage. If they do not work, try other techniques to promote learning.
- ✓ **Try a different interaction mode!** Although the curricula include a variety of individual, paired, small-group, and large-group activities, each group of participants is different. If a large group activity is not going well, a small group or individual activity might be preferable to allow for deeper thought or lively discussion. Likewise, if small groups are going off-topic or are stalled, it may be necessary to bring them together to re-energize and "publish" (synthesize and report out) common knowledge. Consider the advantages of the various modes:
    - **Individual.** Allows each person an opportunity to pursue with deeper introspection the personal applicability of newly-acquired knowledge. This is especially good for introverted individuals who may be more comfortable with individual processing of the material. Examples include visualization, reflection exercises and next steps worksheets.
    - **Pairs.** Ensures that everyone "speaks" with the advantage of working with someone else. It provides a safe opportunity for shy or reticent individuals to share their thoughts. It also allows participants to reach resolution quicker than with small groups.

- **Small Group.** Allows 3-5 individuals to share their perspectives which stimulate thought and creative problem solving. Excellent for individuals who are not particularly shy on an interpersonal basis but who are uncomfortable in large groups.
- **Large Group.** This provides a way for many people to share knowledge and experiences, get a sense of the groups' feelings, and strive to reach a common understanding of an issue or problem. It tends to favor articulate and extroverted individuals.

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Guest presenters–asset or distraction? Maybe you have a colleague whom you think could make a splendid contribution to the training, or you know a terrific volunteer that can share practical experiences. How do you make sure this individual doesn't take the group off track or end up lecturing for an hour? Of course, you can prepare the individual and give them a time limit. You could then build in the experiential opportunities for the group.
Another option is to invite them to take an alternative role. Consider the following ideas to support your training:

Prepare a guest presenter with specific questions and invite them to be a part of a panel as an add-on to the workshop.
Ask them to sit at a designated table during informal lunchtime roundtables.
During the welcome, introduce them as a resource or mentor volunteer and encourage other volunteers to take advantage of their expertise during breaks and after the workshop.

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Participants:

Although you may have made similar presentations for different groups of participants, each group is unique. You will need to adjust to this group. Consider whether you have done the following:

✓ **Know your participants**. Learn what you can about your participants, including level of background and experience in the topic, related community experience, age, knowledge of particular communities or regions, etc. Understanding their unique characteristics will ensure the training's relevancy to participants' ability in making connections between the material presented and their own experience. Ask participants why they are interested in the topic ahead of time, and what concerns they have. Tailor the module to address the group's concerns.

✓ **Provide examples**. As a facilitator, think about how to include more examples that are relevant to the participants' day-to-day volunteer service. It is very helpful if facilitators share personal stories and experiences illustrating elements of the training. This models the importance of connecting what they are teaching to one's life and encourages the participants to do the same. Stories or examples do not need to be elaborate or intense. In fact, basic simple stories from ordinary, everyday life are powerful because they show the immediate, and very real, application of the content being shared.

- ✓ **Monitor the group "vibe."** Make sure you or a member of your team is tracking physical and psychological safety. Stop an activity if participants become physically or emotionally exhausted.

Q 9. *What about timing? I always seem to run out of time?*

A Timing is a big challenge for most facilitators. The curricula provide approximate times, but several factors can influence the timing, including the group's size, a delayed start-up, or some extra time needed to complete an exercise.

As a facilitator, you need to adhere to the schedule while at the same time honoring the need for flexibility given learning styles and the discussion that the material generates. While it is important to be mindful of your time, and the management of it, you never want the clock to completely control your training. You will want the training to be fast-paced enough to keep participants alert and involved, yet slow enough to allow them to deepen their understanding. So what do you do? Plan ahead and share responsibility!

Step 1. Plan Ahead.

- ✓ **Note the suggested time frame for activities.** The modules come with an agenda that includes suggested times for the various exercises. While these are estimates, they can be useful for keeping you on track to complete the module on time.
    - **Take time for the entire activity process.** Besides time for the activity, be sure to allow time for participants to process, generalize, and apply what they will be learning. Allow 3-5 minutes for each main point of information you want to emphasize. If you have three main points, for example, you will need 9-15 minutes to discuss each of these.
- ✓ **Build a cushion.** Since there will always be unexpected delays or an extensive, impassioned discussion, be sure to build in additional time in your schedule for such a contingency.
- ✓ **Account for breaks and for movement.** Do not forget that participants generally need a break about every 1 ½ hours. If you do more than one module during an event, be sure to allow time for these breaks as well as adequate time for meals. (See Chapter 1: Logistics).

Step 2. Share the responsibility

- ✓ **Establish punctuality agreement**. To avoid late starts that will be difficult to make up later, encourage punctuality. Make time accountability one of the group agreements (See Chapter 3: Group Management). As the facilitator, explain the reasons to build in sensitivity to time throughout the session(s). Before breaking up into groups or taking a rest break, agree on a signal to bring everyone back together.

TIP	
T I P	**Quiet signal, time, and movement.** Keep in mind that although you will lose some time moving the group in and out of small group or individual activities, you can establish a way to speed up this process. For instance, when the time allotted for an activity is over, hold up one hand and make eye contact with someone as a "quiet signal." Each participant who sees this is responsible for holding up one hand and making eye contact with someone else who has not yet seen the hand signal. Or invite the group to "clap once if you can hear my voice," "clap twice if you can hear my voice." Usually by the third time, the group has quieted down, except for the clapping. Some trainers have their own favorite instrument (e.g., gong) or method to bring folks back. There are many ways to both boost and quiet the energy of the group. See the Resource list for ideas.

- ✓ **Manage the debrief.** Maximizing participation does not mean calling on every raised hand. If time is running over, acknowledge the people with raised hands that you will not be able to call on, and seek the group's permission to move on to the next activity.

TIP	
T I P	***"Just one more hand."*** As time is running out, it can be helpful to announce, *"I will take one or two more hands."* This lets people know time is running short and it will help prepare them for the transition to the next exercise. If the group is determined to continue, offer this as an opportunity to choose, "*This is really important sharing, however we are going over time. If we continue with this discussion, some of what we want to accomplish will need to be cut. What would you like to do?*" Whichever decision is made, an empowered group will stay engaged.

Q 10. *What do I do if it looks like we are going over time?*

A Adjust the agenda and do less. What you do not want to do is keep the group over the allotted time for the event without their consent!

Although learning is enhanced when multiple methods (small groups, pair reflection, etc.) are used, the drawback is that it can take longer due to the time needed for people to break off and reassemble. Also, because some topics or activities generate deeper reflection, discussion, and sharing, there is a temptation to spend significantly more time than is allotted for that segment. Some strategies to handle time include:

- ✓ **Adjust the agenda.** If a topic (reflection, exercise, role-play) leads to a long but valuable group discussion, or participants are energized to continue with an exercise and it is pushing you into overtime, decide whether or not to continue the exercise.

- **Continue.** If an exercise or discussion is continued, a later exercise may need to be reduced or eliminated altogether. Either decision is acceptable. In either case, you will want to contract with the group to go over time or halt the sharing.
- **Stop.** Determine a good stopping place and ask the group if it is willing to meet again to complete the process. Establish a date and time to do this.

✓ **Do less.** In general, it is better to complete fewer exercises or topics well than to rush through the program in order to cover every exercise. Depth of understanding is better than superficial exposure. Just be careful not to routinely shortchange your groups by never getting around to all of the material. If that is the case, you may want to consider lengthening the time of the workshop or decreasing your expectation of how much you can cover given the time constraints.

✓ **Lengthening the time for the next workshop.** If your groups consistently need twice the time allotted in the modules, assume that will happen in future events and adjust the overall length of the event accordingly.

References & Additional Resources

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- Van Gundy, A., ed. *101 Great Games and Activities.* Jossy-Bass/Pfeiffer: San Francisco, CA, 1998. This book provides great activities to energize your group or to develop teamwork.
- Winer, M., and K. Ray. *The Collaboration Handbook.* Wilder Publishing Co.: St. Paul, MN, 1997. This book provides foundational information about collaboration, specific examples of collaboration among organizations, and ideas to increase collaboration with many types of groups.
- More Resources on the web for warm-ups, icebreakers, and energizers. http://adulted.about.com/od/icebreakers/Educational_Icebreakers.htm, ; http://wilderdom.com/games/Icebreakers.html
- This website provides basic concepts and additional references regarding adult learning theory. http://www.ncrel.org/sdrs/areas/issues/methods/technlgy/te10lk12.htm
- American Society for Training and Development is a professional organization for those who train and facilitate adults, especially in business settings. There are many resources available on their site. www.astd.org
- This website provides basic concepts, tips, activity suggestions, and additional references regarding cooperative learning. http://edtech.kennesaw.edu/intech/cooperativelearning.htm
- This website provides information about experiential education philosophy, theory, research, and evaluation. www.wilderdom.com
- Gibbs, J. *Tribes: A New Way of Learning and Being Together.* Center Source Systems, LLC: Sausalito, CA, 1995. This book provides both theoretical information and sample experiential activities related to cooperative learning for groups.
- This website provides an overview of foundation theories of adult learning as well as resources and links to other sites about this topic. http://adulted.about.com/gi/dynamic/offsite.htm?site=http%3A%2F%2Fagelesslearner.com%2Fintros%2Fadultlearning.html

- Kagan, S. *Cooperative Learning.* Kagan Cooperative Learning: San Juan Capistrano, CA, 1994. This book provides both theoretical information and sample experiential activities related to cooperative learning for groups.
- This website provides an overview of basic principles of adult learning. http://honolulu.hawaii.edu/intranet/committees/FacDevCom/guidebk/teachtip/adults-2.htm
- Rohnke, K. and S. Butler. *Quicksilver*. Project Adventure, Inc., Kendall/Hunt Publishing Company: Dubuque, IA, 1995. This book provides unique cooperative and experiential activities to energize a group and help a group work together as a team.
- The Association for Experiential Education (AEE) is a nonprofit, international, professional membership association dedicated to experiential education and the students, educators and practitioners who utilize its philosophy. The website includes links to research and resources regarding experiential education. www.aee.org

Chapter Three: Group Management

Introduction

Groups are made up of people who participate in training for a variety of reasons, have their own preconceived opinions and needs, and may come from different cultural backgrounds. This chapter will provide you with help on how to create a safe learning environment, manage conflicts, and motivate and support your participants.

Q *1. How do I create a safe learning environment?*

A By reaching shared agreements with the group and honoring them consistently.

Group members may come to workshops excited to learn, feeling they already know the information, or feeling distracted or resentful. They will, no doubt, have differences based on preconceived notions and past experiences. As structured in the curricula, the modules invite participants to share stories, feelings, and other personal information. This requires trust in you and in one another. As the facilitator, your responsibility is to create a safe environment in which all members of the group feel comfortable participating. Consider the following strategies:

- ✓ **Get acquainted with your group.** Before each session, make sure that you, the facilitator, and any others assisting you with the training are prepared and ready to welcome participants as they arrive. You may want to have participants wear name tags or use table tents with names unless they already know one another well.

TIP	***Count off by 3*.** People who know each other often sit together. A simple way to help people mix and get to know each other is to divide into small groups by counting off. For instance, if you have a group of 20 and you want small groups of 4 people each, you will ask the group to count off to 5. People often groan about counting off but usually, in the end, appreciate the opportunity to talk with new people.

- ✓ **Invite participants to relax and feel comfortable with one another.** Warm-up exercises or energizers are quick mini-activities (30 seconds to 5 minutes) designed to raise the energy level and focus of the group. They are fun ways you can help groups get to know each other and begin introducing the curricula concepts that will be more fully explored during the workshop. See the end of the chapter for a short list of energizers you might want to try and the resources list for additional sources for warm-up ideas.

TIP	
	New groups. At the beginning of a training event, participants look to the facilitator for leadership. This is a good time to try one or more of the following: • Introduce activities that help participants to get to know each other. • Facilitate individual reflection or clarification activities. • Offer participants a chance to express their hopes and expectations for the group.

- ✓ **Identify shared agreements.** Establish shared agreements ("ground rules") that will keep group members safe emotionally and physically. Make sure the agreements include ways for participants to speak and listen to one another to ensure that all voices are heard. Question 2 has more on shared agreements.
- ✓ **Promote respect and equality of participants.** Establish an environment of equality by stating up front that you believe that everyone present has something of value to offer, and everyone (including yourself) has something to learn. "We are all teachers AND learners." Honor your commitment to equality by offering the group opportunities to speak and participate in consensual decision-making with respect to process and content.
- ✓ **Encourage supportive relationships and full participation**. Model the pro-social behaviors that you hope to see in the group: openness, encouragement, sensitivity, mutual learning, respect and competence.
- ✓ **Continue group growth and cohesion**. Allow the group to solve its own dilemmas with the facilitator as a guide. Use cooperative learning groups.
    - Assign each group responsibility for learning about a topic, and then teaching other participants about that topic or situation.
    - Leave enough time for a closing and administering training feedback surveys after each module or at the end of the series of modules you are facilitating.

Q *2. What are shared agreements? Must I have them?*

A Shared agreements or ground rules are a fundamental and essential aspect of creating group safety.

The goal of a group's shared agreements is to create an environment in which everyone in the group is valued and feels safe. Shared agreements can also serve as a great mechanism for discussing problems as they arise and reinforce the group's values and goals. The agreements act as boundaries for the group experience, beyond which no one's sharing will leave the group.

There are several ways you can arrive at a set of shared agreements depending on whether the group has already been meeting together, and the time you have to devote to this task. Two options are:

- ✓ **Each participant group develops its own shared agreements.** If you decide to develop your own set of shared agreements, there are questions on page 48 that can guide you through the process. You will want to dedicate at least 15-20 minutes of the agenda to complete this process,
- ✓ **Offer the group a set of shared agreements.** If you have limited time, or have already gone through the process in a previous session, present a set of proposed shared agreements (like those below). Ask if the group wants to make any changes before accepting them.

Sample Group Agreements

1. **Be fully present**. *I agree to share and participate at whatever level I feel safe and comfortable. I understand that the more I participate, the more I will learn.*
2. **Keep confidences.** *I agree to maintain confidentiality about personal experiences shared, unless I have been given permission to share them with others.*
3. **Honor the other.** *I will appreciate and value our similarities and differences.*
4. **Speak your truth only and not for anyone else.** *I will speak for myself and not attempt to speak anyone else's truth.*
5. **Care for yourself and others.** *I will make sure that I take care of myself and others by being emotionally and physically safe.*

TIP	***Post shared agreements.*** Write the shared agreements on easel paper and post them at the beginning of each session. When exercises require more personal sharing or intense group work, it can be helpful to restate the agreements.

Q 3. What happens if someone breaks an agreement?

A If an agreement is broken, the way it is handled is another opportunity for the group to grow. If a shared agreement is broken, consider the following:

Step 1. Raise the issue with the group and share what you are feeling (or if a participant has also noticed, ask that she or he take the lead in expressing the concern). Try to re-state the shared agreement in light of the current situation.

Step 2. Solicit some response from the rest of the group by asking about feelings or reactions to the incident.

Step 3. After hearing from the group, either suggest a possible solution or invite the group to offer its suggestions.

Scenario: Alicia has just shared an experience she had when dealing with her mother's dementia and Martin responded inappropriately.

Martin: *No, Alicia, it's not like that at all. It's this way . . ."*

Facilitator: *I am feeling uncomfortable with what just happened. Alicia shared her story and Martin denied Alicia's experience. I know we all have our own experience and can only speak our part of the truth. Alicia, how are you doing?*

Alicia: *Well, I guess I was a little taken aback and I feel shy about speaking up now.*

Martin: *Hey, I'm sorry Alicia. I only meant to say that my experience was different, but I realize I said it in a clumsy way that wasn't very respectful of your feelings or experience. Let me try again.*

Q

4. What causes conflict in my group? If I cannot keep it from happening, what do I do about it?

A

People often come to meetings with differences in expectations, communication styles, and experiences of decision-making processes. These differences can contribute to creativity but also can cause conflict. Remember, not all conflict is bad. Conflict allows people to share ideas and learn new perspectives.

✓ **Conflict instigators.** Behind most conflicts are legitimate concerns. People have their own ideas and expectations. Listed are types of challenges that might engender conflict in a group:

- Competing goals
- Resource allocation issues
- Different values
- Different skills and interests
- Different language and culture
- Varying perceptions about roles
- Fear or lack of trust
- Different needs

✓ **Manage conflict creatively**. Begin with the assumption that everyone has a right to be oneself, with individual interests and opinions. The challenge is to turn the energy of the conflict towards creative outcomes. Here are some steps you can take during a conflict to guide the situation into a positive direction:[7]

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[7] Diamond, R. (2000, March). *Welcoming conflict: Conflict Resolution as a Creative Process*. VISION/Action.

Step 1. Regain Your Own Center. Take a deep breath. If you need to, also take a break. Ground yourself mentally and emotionally. Acknowledge that conflict is happening and accept the feelings you are having before addressing the issue head on.

Step 2. Understand the Other Person. Ask the conflict instigator for more information and allow him or her time to explain. Identify his or her concerns and encourage expressions of feeling. Actively and deeply listen—paraphrase what you think you have heard for understanding. Write down descriptions, needs, offers, and (when appropriate) remind the group of relevant shared agreements.

Step 3. Find a Third Way. Your goal is to transform conflict. As long as people hang on to their positions and beliefs, conflict will continue. This calls for a creative approach that involves developing a mutual understanding and generating a third way that is not "my way" or "your way." Create alternative scenarios. By reframing the problem, as an opportunity, the group can get to a win-win solution, one that combines the best of both interests. Develop this "Third Way," to get beyond "My Way" and "Your Way."

Scenario: Communicating cross-culturally.

Joan: *I know we are being encouraged to be respectful with our kids. But some of them offer us food. I know they do not really want us to eat their food. My mentee hardly has enough food for lunch.*

Sergio: *Some cultures feel offering food is a way to show they honor their elders. To decline the food can be insulting. Joan, I don't think you can speak for all of the children on this topic.*

Joan*: Maybe not, but I still don't want to eat what little food my mentee has for herself. I don't think you have convinced me otherwise.*

Facilitator: *It looks like we have conflicting opinions. What other ideas does the group have on how to treat a child that shares food? What are the alternative ways to handle this situation?*

Maya: *I am wondering about our assumptions about what a particular child thinks is appropriate. I'd like to think about how we could start a conversation with a child that would allow them to tell us their individual opinion and more information on their cultural values. Or maybe there is another way to be gracious and accept the food AND think about how to return such generosity.*

TIP	***Take a time out.*** Not all conflicts can or should be addressed immediately. While you do not want to sweep a problem under the rug, the group may benefit from taking a break or switching to another activity (e.g., personal reflection time). You may want to put an issue in the "parking lot" to come back to later. Or, you might say, "*I think many of you have strong feelings about what just happened. Before we go on, take a few minutes to center yourself and make a few notes about how you are feeling and what we can do to solve this problem. I will call the group back together in 5-7 minutes*."

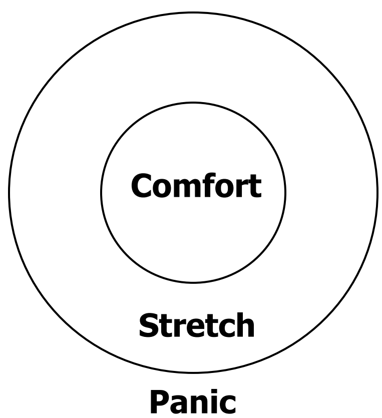
5. What do I do if people are not talking?

It is important to support participants in the growing process while ensuring that participants do not feel overwhelmed and end up shutting down. Try this:

- ✓ **Use the** Comfort **Zone, Stretch Zone, and the Panic Zone** as a tool to maximize learning. Explain to the group:

  Imagine your comfort zone as a giant circle of rope all around you representing the space where you are confident and at ease. We all have our comfort zone even though it may be a different shape or size for all of us. Now take another rope and make a circle around the first. The ring between the inner and outer circle is the "stretch zone"—the area of discovery, growth and risk—space into which we must all step if we are to try something unfamiliar and expand our comfort zone. Beyond the stretch zone lies the panic zone—a place where learning no longer occurs and we operate in the "fight or flight"—or sometimes frozen mode.

Comfort Zones



After covering this concept, remind the group of the following:

- Encourage sharing within the group at whatever level feels comfortable to the group.
- At the same time, encourage individual participants to be open to potentially experiencing some discomfort when an activity in the group creates those feelings.
- If it appears that a participant is going into her/his panic zone, talk privately with that person as soon as possible. Consider taking a break so you can do this immediately.

✓ **Before large group call-and-response.** When you are encouraging large group sharing, try the following to spark richer thinking and allow the fast and slow responders an equal chance to share.

- Assign "think time" by asking participants to take at least 20 seconds to think and jot down some notes before sharing ideas.
- Invite participants to share with one other person before sharing in large group.
- In small groups, assign roles to each group member.

Q 6. *What can I do if a participant talks too much?*

A A facilitator must consider whether one individual's processing of an experience or insight is helping or hindering the rest of the group's process. If a discussion seems to be benefiting only one person and frustrating the others, try to move the process along.

✓ **Acknowledge contribution and move on.** Appreciate that individual's contribution and then say, "*It is time to move on*," and offer to check in with that person after the session if they need to continue or are seeking specific input for their situation.

✓ **Encourage others.** Rather than focusing on the one individual talking too much, encourage others to participate. "*How do others see this?"*

✓ **Assess how safe it is for participation.** If the whole group is struggling to participate, you may want to consider small groups to lower anxiety and allow people a more comfortable venue to share their thoughts.

✓ **Handling a needy participant.** If you know you have an individual who has a tendency to dominate, you may want to be proactive and talk with them beforehand. Enlist them to help you make sure others in the group get a chance and try to address their need outside of workshop.

T I P	***Step up and step back.*** When you see a pattern in which some participants are dominating conversations while the others are not participating, ask each group member to consider his or her own style. If they are conversation dominators, ask them to consider "stepping back" and letting others express their opinions first. Ask those who typically stay in the listening mode and do not talk to "stretch some" and "step up."

Q 7. What do I do with "side conversations?"

A Side conversations can be very distracting and annoying to both the facilitator and participants near those who are talking. If this is particularly prevalent with your group, you may want to make sure it gets into the group agreements! And don't forget, the newest "side conversations" may be external—cell phone conversations and texting. Keeping your tone friendly, consider trying the following:

- ✓ **Stop and acknowledge the situation**. Ask the talking participants if there is a question. Or acknowledge that you understand that good friends who have not seen each other for a while are anxious to catch up and remind them that there will be time later. Make sure to honor this promise and give the group a break.
- ✓ **Remind the group of the shared agreements.** If the pair continues to talk, you may need to remind them of the shared group agreements, and to be respectful of those agreements.
- ✓ **Recognize possible emergencies or other pressing needs to talk**. This is a good opportunity to remind participants that you trust them to take the conversation or call outside if it is important.

Scenario: You start what will be a 10-minute lecture and two participants in the back continue to talk to each other.

Facilitator: *If you have a question, please share it with the group, not just your neighbor because chances are others have the same question. How can I help you?*

Maria: *We are fine.*

You continue to talk and so do the two participants.

Facilitator: *To respect our fellow participants and make sure they can hear, we agreed to one voice at a time. I know many of you are itching to talk and catch up with each other; I promise to honor our agreement to break in 20 minutes. If at any time you have an urgent situation, please take the conversation outside.*

8. What can I do if participants are discussing several topics at once or interrupting each other?

First, determine if this is a matter of participants interrupting one another disrespectfully (more serious) or just groups of individuals discussing their own topics independently of one another.

- ✓ **Multiple topics.** Try to summarize key themes and ask participants to link their ideas or issues to the central topic. Alternatively, you may want to create a "parking lot" for ideas or issues to return to later (be sure to do it!) so the main discussion can move along.
- ✓ **Interrupting one another.** Cut in and make sure each individual has a chance to be heard. Suggest a process (or remind participants of a previous shared agreement) that will cut down on further interruptions.

TIP	***Use the Parking Lot.*** When a participant raises an item or point that is important, but threatens to sidetrack the current discussion, suggest that the item be added to the "parking lot," and then note the item on a sheet of easel paper. Then, immediately take the discussion back on topic. Throughout the session, you can add issues to the parking lot that come up but are not pertinent to the workshop focus. It is important that the parking lot items be addressed in some fashion prior to the conclusion of the session. Addressing a topic may be as simple as providing a contact or website. It is also possible that those topics may also be the genesis of future trainings.

9. What can I do when the group keeps getting off topic or goofing around?

Consider whether you need to address the side topic that is diverting attention from the main discussion with the group. If not, and it is disruptive, declare a short break to "clear the air."

An early warning signal. While the "class clown" may be someone who is attempting to get attention and power within the group, "goofing off" or getting off topic might be an indicator that the group as a whole is tired or perhaps genuinely feel that something important needs to be addressed before the current item on your agenda. If you find the group routinely gets off topic or seems resistant to the topic you would like to see them discussing, you may want to use these steps to explore what might be happening:

Step 1. Consider the cause. Ask yourself these questions: What are the participants trying to tell me? Are they not interested in the topic? Do they not understand the material? Does the material seem irrelevant? Is there some other important information or an area that needs to be addressed before we can continue moving forward in the training? Or, is the training a rare opportunity for them to catch up with one another?

Sometimes you may need to address the process of getting off topic with the group. If you do this, share with the group your observations about what you have noticed.

Step 2. Solicit information from the group, about the group. After gathering this information about how the group is working together, solicit information about what might be keeping the group from moving forward. You might want to start a group discussion to see if there is something you should be doing differently to keep everyone engaged. Now, if participants seem ready to move back onto topic, ask if there are any additional reactions to what has been discussed.

Step 3. Take a break. Give the group a short break so that you, the facilitator, can rethink your agenda and the participants can shift back to focus on the training.

Q 10. *What do I do with the group when it appears discouraged or low energy?*

A First, know that groups have good and bad days. The energy and emotions of a group ebb and flow, just like those of the individuals that make up the group. Try these strategies:

- ✓ **Review the common vision.** Keep the learning outcomes for the workshop before the group. Consider inviting your group to restate (even readjust) the common vision you may have agreed on before starting. They will feel more ownership and commitment to see the training through to the end.
- ✓ **Clarify expectations**. Invite people to revisit the shared agreements or propose new ones to deal with problems that were not anticipated.
- ✓ **Share responsibility.** People want to know what is expected of them and tend to be more engaged when they are a part of the process. Encourage cooperative learning and consider using the roles suggested in the next section to encourage participation in small or large groups.
- ✓ **Acknowledge success.** Especially when the energy is low or the group is dealing with conflict, take time to reaffirm the value of the work and learning and the building of a community. Point out that some frustration or low energy can be a normal part of the group process. Create regular opportunities for appreciation, validation, and acknowledgement.
- ✓ **Inform and modify.** Encourage your group by hinting about topics of special interest to them in upcoming modules. Consider reallocating time away from low-interest to high-interest topics.
- ✓ **Try some fun**. It is common for a group to return from lunch dragging. Be sure to incorporate some interaction or an energizer (see the end of the chapter) to both pick up the energy and help the group refocus and prepare for the next activity.

11. What if I am not sure about how to handle the group or material?

It is OK to be uncertain. Seek help on the spot, or offer to find an answer later**.**

You may not have the answers to every question that might be posed to you, nor know how to help the group proceed when it has gotten bogged down. A good facilitator does not need to be the expert on every problem or issue that arises, but is a willing co-learner along with the participants. In situations like this, consider the following options:

- ✓ **Consult your co-facilitator.** Talk with a co-facilitator or assistant, if you have one. Instead of doing this in private, try having the conversation in front of the whole group so that everyone can hear the exchange. This models teamwork by employing openness and transparency in co-facilitation, and it helps dispel the expectation that the facilitator is supposed to have the answer to every question and the solution to every problem.
- ✓ **Consult with the group.** When in doubt, consider asking the group for assistance and decide what to do next together. Ask if anyone has experienced a similar issue and how they handled it.
- ✓ **Investigate and follow-up.** If you really do not have an answer to a perfectly good question, offer to find an answer later. For instance, you might say, "*I am not sure about that, let me think about it* (or "*research it"* or "*find you the document") and get back to you after the break* (or "*next week").* It is important, though, that you follow through with the follow-up promised.

12. What can I do to stop the group from deferring to me for everything?

Explicitly ask participants to offer their insights and tips, routinely share responsibility with participants and, above all, avoid problematic behaviors that take you out of the facilitator's role. Let us take a look at some steps in this process.

Step 1. Give permission to question. Identify and educate your participants about the very natural tendency for people in groups to defer to someone in authority, in this case, the facilitator. Acknowledge that it takes courage to speak out when necessary and that you will not be threatened by it if someone does so.

Step 2. Share responsibility. Create a variety of ways for participants to share responsibility and insights. For example:

- ✓ **Arrange for comments to be submitted anonymously** or go around the group with the facilitator sharing last (always allow a participant to pass!).

- ✓ **Leave the room** for part of a discussion.
- ✓ **Use small groups** or pairs to share or elicit ideas before a large group discussion.
- ✓ **Assign roles to promote cooperative learning.** Identify roles that specific members of the group can take as they work together. Here are a few suggestions:
  - **Group Facilitator:** responsible for organizing the work of a small group and keeping it on task.
  - **Recorder:** responsible for taking notes and/or writing on easel paper.
  - **Reporter**: responsible for sharing the work or conclusions of the team during a large group report out.
  - **Timekeeper**: responsible for assuring that the team is able to devote appropriate time to each assigned task and complete all its tasks within the allotted time.
  - **Observer:** responsible for watching and reporting on the group process.

Step 3. Stick to facilitation. The curricula are most successful when the facilitator "facilitates," literally, "helps to make things go easily." As facilitator, keep the following points in mind:

- ✓ **Neither dominate** the conversation **nor jump** into a discussion or dispute with the "right answer." Instead, help everyone participate and keep the rhythm of the process moving. Discussions should not turn into debates. If differences of opinion emerge in the group, the facilitator should encourage everyone to keep an open mind and listen to each of the opinions expressed.
- ✓ **Do not lecture for long periods** and/or spend a very long time explaining something. You are not expected to have all the answers, but be a genuine co-learner who supports the growth of the group.
- ✓ **Do not try to be perfect.** Just as you will try to honor everyone's contributions, so too should you seek to honor your own efforts without criticism.

13. What do I need to know about diversity and cultural competence while managing a group?

"Cultural Competence" is a set of congruent behaviors, attitudes, and policies that come together among people that enable them to work effectively in cross-cultural situations.

In this case, "cultural" consists of the interconnected human behavior that includes thoughts, communications, actions, customs, beliefs, values, and institutions of a racial, ethnic, religious, or social group. "Competence" means that one is knowledgeable and has the ability to meet the needs of a culturally-diverse group. To build these skills, try the following:

Step 1. Acknowledge and incorporate the importance of culture into all of your work. For example, when problem solving, you may notice gender differences, such as men wanting to "fix" the problem and women wanting to "process" before fixing the problem. Keep in mind that not everyone fits into "typical" cultural roles.

Step 2. Assess the group, and yourself, for cross-cultural relations. As a group, take time to value all group members' cultural, ethical, and social values. Investigate and understand your own cultural values and norms, particularly relating to interpersonal encounters. For example, invite participants to share in pairs about situations where culture has influenced their decisions or about how they handled an interaction with a culture with which they were not familiar. Given that the participants may be working with clients who are very different from themselves, this is an important personal insight.

Step 3. Communicate. Be vigilant about the dynamics that result from cultural differences. Develop your skills in communication, particularly with those who have different cultural backgrounds. Stop, ask questions, and learn to listen to the answers. By listening to new voices we gain new perspectives. For example, some cultures talk over one another and this is an indicator of engagement rather than disrespect. One person at a time or raising your hand to speak may be hard in this group. It will be important to watch to make sure everyone is included and acknowledge before the group the difference.

Step 4. Understand. Expand your cultural knowledge. Learn basic historical factors and psychosocial stressors that impact minority populations with whom you work.

Step 5. Adapt programs to meet culturally-unique needs. Advocate and support inclusion with your group. As a facilitator, try to increase your awareness of your group to maximize the training time. For instance, note how and when they are listening (or not listening). Some cultures have a strong tradition of how one respects elders and may wait for the senior participant to speak first. By being aware of this practice, you will be more successful with the group.

An appreciation for diversity and the ability to work effectively in cross-cultural situations are critical needs as you work with groups from different backgrounds. Be aware of the following:

- ✓ **Power imbalance**. Strongly- and widely-held prejudices like racism, sexism, classism, ageism, ethnocentrism, ableism, and heterosexism lead to imbalances of power within groups and communities. These imbalances in turn constitute significant barriers to making change happen (see resource list for more information).
- ✓ **Discrimination affects all of us**. It has happened in one form or another to everyone at some point in their lives. The result of this past experience may elicit very painful and powerful emotions. You may want to acknowledge this fact with your group.
- ✓ **Denial.** Many well-meaning people have a tendency to deny the differences and focus on how similar everyone is because those in a group have come together for a common cause. Sometimes this can lead to discounting the experiences of people who are not part of the majority racial or cultural group.

References & Additional Resources

- Bigman, L., and S. Chappelle. *Diversity in Action*. Project Adventure: Hamilton, MA, 1998. This book provides both theoretical information and sample experiential activities related to addressing diversity issues in a group setting.
- Institute of Cultural Affairs. *Group Facilitation Methods*. Phoenix, AZ: Institute of Cultural Affairs, 2000. www.ica-usa.org The Institute of Cultural Affairs (ICA) is a private, not-for-profit international social change organization that promotes positive change in communities, organizations and individuals through highly participatory techniques.
- Jamieson, D., and T. Justice. *The Complete Guide to Facilitation*. HRD Press: Amherst, MA, 1998. This book provides theoretical information as well as tips for facilitating in a group setting.
- The Mediation Information and Resource Center provides links to articles, research, and resources about resolving conflicts. http://www.mediate.com/
- Mediation Training Institute (MTI) is an international provider of training and certification in the core competencies for managing workplace conflict. This website has links to resources and research regarding conflicts in a group setting. http://www.mediationworks.com/
- Slattery, L., K. Butigan, V. Pelicaric, and K. Preston-Pile. *Engage: Exploring Nonviolent Living.* Pace e Bene Press: Oakland, CA, 2005. This book provides theoretical information and alternative methods to address conflict in groups.
- US Office of Minority Health. *Building Bridges, Tools for Developing an Organization's Cultural Competence and Towards a Culturally Competent System of Care.* La Frontera, Inc.: Washington, D.C., 1998. This resource provides theoretical information and practical tips to build cultural competence within organizations.
- Vineyard, S., and S. McCurley. *Managing Volunteers: Diversity: A Rainbow of Opportunities.* Points of Light Foundation: Baltimore, MD, 1992. This book provides an overview of theory and practical applications for managing volunteers in a diverse group.
- Winer, M., and K. Ray. *The Collaboration Handbook.* Wilder Publishing Co.: St. Paul, MN, 1997. This book provides foundational information about collaboration, specific examples of collaboration among organizations, and ideas to increase collaboration with many types of groups.

Additional Materials and Resources

Chapter 3: Group Management

1. **Guiding Questions: Developing your own shared agreements**
2. **Energizers and Warm-up Exercises**

Guiding Questions

Developing your own shared agreements

The following are some questions you can use with your group when creating your own shared group agreements.

- ✓ How do you want or like to be treated?
- ✓ How do you want or like to treat others?
- ✓ What does it mean to respect someone?
- ✓ What is the best way to respect you?
- ✓ What will help you cooperate with the people in this group?
- ✓ What does it mean to be physically and emotionally safe?
- ✓ What does it mean to take risks physically and emotionally?
- ✓ What does it mean to be present in the group?
- ✓ What can you say or do to help this group work together?
- ✓ What can you do or say to hinder this group working together?
- ✓ What is the most challenging thing about trying to work with people in this group?
- ✓ What are the rules here?
- ✓ What does it mean to tell the truth?
- ✓ What do you feel are the consequences of telling the truth?
- ✓ What is your biggest fear about being in this group?
- ✓ What about the group makes you feel the most comfortable?
- ✓ What about the group makes you feel the most uncomfortable?

Energizers and Warm-up Exercises

Are You More Like…?

Gather the group in front of you and ask them the first "Are You More Like…?" question. While asking which choice they are more like, point to the left and to the right, making an apparent gap between the two choices. Participants are to decide which they are more like and move to that side of the line. Repeat about 8-15 times.

Examples: Are you more like…
…the accelerator or the brake?
…action or suspense?
…a boomerang or a Frisbee?
…a bus or a plane?
…a comic book or a history book?
…a cruise or a hike?
…the desert or the jungle?
…an explorer or a settler?
…the rose or the thorns?

Brain Gym

These fun warm-ups get everyone thinking!

1. Close both fists. Extend the thumb on the right and the index finger on the left hand. Switch. Then switch back. Repeat about a dozen times, then do #2…
2. Move right hand in a horizontal circle, as if wiping a tabletop. Move left hand in a vertical circle, as if pedaling a bike. Then switch hands. Repeat 1-2 times.
3. With right hand, pedal a bike forward. With left hand, pedal bike backwards. Then reverse the direction each hand is moving.
4. Sit or stand on left foot and move right foot in a clockwise circular motion. Keep doing this while trying to move your right hand in a large "6" pattern.
5. Stand on your left foot. Wiggle the toes on your left (weight bearing) foot while also wiggling the fingers on your right hand. Then jump to your right foot, and wiggle the toes on the right foot while also wiggling the fingers on your left hand. Jump back and forth, always wiggling the toes on the weight-bearing foot and opposite hand. See how quickly you can hop back and forth while wiggling the correct fingers and toes.

Categories

Call out a category to the whole group then invite participants to mingle and sort themselves with others who show the same preference within the category. Try: 1) professional sports team, 2) most-listened-to radio station, 3) favorite season of the year, 4) make/brand of automobile, etc. You may want to have each group make up a short cheer that highlights the virtues of their category, to present to the rest of the group, or simply let each group call them out in turn.

Commonalities

In small groups (e.g., three or four people), invite the group to generate a list of things that are common to all the people in their cluster but which you could not identify by looking at them. Some examples: speak a foreign language, have the same number of siblings, are vegetarians, or wear contact lenses. Mingle about, and group into larger groups (e.g., five or six people). Again find commonalities, ideally ones they did not use with the previous cluster.

Each one, Teach one

Divide the group into smaller groups of 3-5. Let each person take turns teaching something to the other people in their small group. Each person gets 5 minutes to teach, so encourage him or her to pick things that will fit into that time frame. For example, teach how to roll your tongue, how to fold an origami animal out of a dollar bill, a new song, a yoga move, dance move, etc. After everyone has had time to teach their small group, ask each group to demonstrate one (or all) of the things they learned to the other groups.

Have You Ever…?

Have the group gather in a circle with a spot marker for each person in the group, less one. Have the extra person stand in the middle of the circle and think of something they have done, somewhere they have been, something they like to do, etc. (it should not be something that is visibly apparent, such as "wearing blue jeans.") That person then asks the group, "Have you ever…_________?" (Fill in with the thing that is true for them). Any members of the group that can answer yes to the question need to change their spot. The person in the middle tries to get one of the, then empty, spots. You can further limit movement by not allowing people to move to spots that are on their immediate right and left. The person left without a spot will be in the center and asks the next question.

hapter Four: Distance Learning and Web Conferencing

Introduction

Perhaps your project serves a rural region with volunteers spread out across the state and you can't afford the time and money to get them together, or you want to use a discussion board between on-site training sessions to keep participants engaged. In either case you may be considering distance learning. A teaching tool that began as a unique way to use mail, shortwave and FM radio to train teachers and reach students in remote areas, distance education has grown in the past decade to include mainstream conferencing and online courses with the growth of the Internet and many associated online resources. In this chapter we will provide some basic information and advice about distance learning as you consider adapting on-site training to the online context.

Q 1. *What exactly is distance learning and web conferencing?*

A Distance learning relies on instructional technologies and systems that deliver education to participants who are not physically "on-site." While we might recall the correspondence course that came through the mail as an example, in this chapter, we are primarily talking about training conducted over the Internet.

Distance education is the process of creating a quality learning experience for people separated by distance. Although it is a virtual rather than a physical training setting, your knowledge of adult learning principles and good training practices will still work well, with some adaptations.

Online technologies used in distance education may be divided into two groups: synchronous and asynchronous.

Synchronous training is a mode of online delivery in which all participants are "present" simultaneously in the virtual classroom at the same time. Web conferencing sessions (or "webinars") are an example of one of the most commonly used synchronous technologies for conducting training remotely. This chapter focuses on distance learning through synchronous technology.

Asynchronous training is a mode of online delivery in which participants access course materials on their own schedule. Participants are not required to be together at the same time but can use, read and respond to message boards, e-mail, social media posts, and recorded video at their convenience.

Blended Learning. A combination of the two modes, or blended learning, is flexible enough to support adult learners by accommodating a variety of learning styles and formats. For instance, in addressing the topic of effective communication, you might conduct a face-to-face session which includes an opportunity for participants to practice communication strategies. Then, you could ask your participants to watch an online video (asynchronous) to reinforce the concepts and, finally, you might facilitate a webinar session (synchronous) based on the participant answers to an exercise they completed at home.

Q 2. *Why would I want to facilitate a web-based training session or use other distance learning tools?*

A First, know that you are probably already using components of distance learning and remote training right now. When you e-mail training documents to volunteers to study, schedule a conference call together, or share something on Facebook, you are using remote training technology! Even if you primarily engage in on-site training, you may be supporting volunteers in between training sessions through distance education tools.

In the case of web conferencing or webinars, when done well, the "virtual classroom" offers the following:

- ✓ **Creative and educationally-sound experiences for participants.**
- ✓ **Opportunities to bring together experts and colleagues regardless of the distance.** No need to convince experts to travel across the state!
- ✓ **"Green" practices and savings.** In addition to limiting the travel of participants and thus, your project's carbon footprint, your project will save travel cost (gas, flight, lodging) during this time of limited resources.
- ✓ **Convenience for user and facilitator.** The facilitator is freed from the hassles of finding training space. The participant doesn't have to leave their office or home to "attend" training and can save time.
- ✓ **A recording of the training session that participants can access any time.** Web-based training sessions can be recorded, providing a convenient way to share aterial with students who want to view the material again or catch up on a g session they missed.

Q 3. *So, when does it make sense to conduct web-based training instead of on-site training?*

A While you don't want the technology to drive your training objectives or overshadow the needs of the participants, training topics and modules that at first glance may not seem like good material for webinars may actually work very well. You may also be able to offer a mix of remote training and on-site training.

The following are conditions that may make web conferencing an attractive

- ✓ Participants are scattered over a wide geographical area.
- ✓ You lack the budget for on-site training (travel, lodging, facility, etc.) and participants are unable to make the time commitment for an on-site training.

- You and the participants have access to computer hardware and software to support the use of web conferencing.
- You have access to a web conferencing service, teleconferencing service, and assistance from a tech-savvy partner.

As the facilitator, you will need to determine if web-based training will work for you. Realize that:

- You need to be an advocate for web-based training and believe participants can learn in the "virtual classroom." If you do not believe, neither will they.
- Planning and hosting a successful webinar takes time, effort, and flexibility.
- Successful facilitators are comfortable with technology and have solid technology support. It is essential to learn the virtual classroom technology. This takes some practice (and you will improve over time).
- Successful webinars are more likely when you have a team to assist with technical and organizational support. Even if your team is comprised of just one other person, make sure you get support. (see Question 6)
- The facilitator must be able to maintain the flow of information and manage potentially stressful situations. Know that technology is not perfect, so unexpected problems can occur when conducting remote training. (Many of these problems can be overcome with a little practice.)
- Interacting with learners via an Internet connection and phone is something you and/or a team member should be not only capable of doing but also <u>interested</u> in doing well.
- The ability to multitask is a plus! You will need to be comfortable managing several tasks at once, such as checking the chat window, advancing through the online content (e.g., PowerPoint slides) and interacting verbally with learners.
- Participant interaction and engagement are no less important than in face-to-face training sessions. You will want to use interactive features, such as white boards, polls, and chat creatively to maintain interest and engagement.

Consider your participants:

- also be unfamiliar or uncomfortable with an online learning format.
- and take responsibility for their learning. This includes doing their "homework" by reading assigned material before the training session, engaging in exercises during the training, and doing any assigned "homework" after the training. Participants who prefer to let others engage or do the work during a face-to-face will find this easier to do in a webinar.

- ✓ Everyone needs to be comfortable speaking up and communicating using the on-screen tools (e.g., by asking questions, providing written feedback, or "talking" via interactive features built into the webinar software).
- ✓ Web-based training generally works best in small groups of about 20 participants, so be prepared to break larger groups into separate training sessions. (Larger sessions can be conducted, but this will entail making tradeoffs in terms of fewer opportunities for interaction and reduce engagement.)

Consider topic and timing:

- ✓ Some topics lend themselves to webinars better than others. However, many topics include activities or content sections that work well with web conferencing.
- ✓ Web conferencing is not designed for long training sessions. Experience shows that the ideal length of a webinar is less than two hours, usually about an hour.

Consider resources:

- ✓ Check with your in-house technical support to make sure you have the necessary infrastructure (hardware, operating system, software, Internet speed, etc.) to support the use of web-based training technologies.
- ✓ Make sure your budget allows for investing in web-based training. Consider if you need to rely on a phone-based conference call system for the audio component of the session, thereby incurring webinar and teleconference charges simultaneously. However, don't let cost stop you; there are some free services. Ideally, the money you save by foregoing on-site training will free up resources for web-based training and still allow you to come out ahead!

Q 4. *What do I need to do if I want to use web conferencing for synchronous training? The technology question!?*

A Prepare your participants for this distance learning venue by ensuring that participants have and are able to use the required technology. Difficulty with getting online or hearing with the audio will undermine their ability to fully participate in the distance learning experience..

Hardware Requirements. Web conferencing requires a computer with a high-speed Internet connection. A telephone may also be required, unless you plan to use the web conference service's built-in Voice over Internet Protocol (Voice over IP, or VoIP) feature. Make sure that all participants have high-speed Internet access and e-mail. In any case, it is always best to fully test all equipment and connections before conducting the actual training session.

Other Distance Learning. Web conferencing training is often supported by multiple methods: through e-mailing documents to participants before or after the training, referring participants to website materials and by using social media sites (e.g., Facebook) to post comments, share photos and web links, or get updates.

TIP	
T I P	***Ensure that everyone gets the same document.*** When e-mailing or posting documents, you can first convert them to Adobe Acrobat Reader (PDF) format so everyone can read them regardless of their software. This will also preserve the document format and content. ***Ensure that everyone gets the e-mail.*** For important e-mail messages, select the return receipt option in your e-mail or ask for a return response to ensure that the e-mail got to all participants.

Software platforms: **Choosing the best web conferencing tool for your needs.** You will need to make sure you have access to and/or purchase one of the web-based services (e.g., WebEx, GoToMeeting). These services have similar hardware and software requirements.

There are numerous web conferencing tools that allow you to present slides over the Internet with accompanying audio. Some work in conjunction with audio and some require the user to provide their own conference call-in number. Prices can vary; some charge by length of training session (in minutes) and number of participants while others offer a flat rate structure. There are even a few free tools (i.e., AnyMeeting). Most web conferencing companies offer regular group demonstrations or individual appointments and a free trial period and free training (see Question 5).

Consider the following questions as you review a web conferencing system:

✓ **How many participants do you expect?** Some services set caps on the maximum number of participants and charge you as you exceed the number.

✓ **How much does it cost?** Cost is often tied to participant numbers, session length and desired features. It is still possible to find free software but make sure you know what you are getting. Consider both the software and audio (phone or VoIP) costs.

✓ **What features will you need?** Interactive features can help in keeping the group engaged. Some of the features you might see include:

- **Chat:** Participants can exchange text messages with the session host and/or each other to ask and respond to questions, and to share thoughts and ideas.
- **Polling**: Allows you to quickly collect information from participants during the session to find out if they are paying attention and learning (e.g., quizzes) or to get their opinions about something (e.g., surveys).
- **Feedback tools:** Participants can raise "their hand" or use emoticons (e.g., smiley faces) to instantly react to what's happening or to be recognized for a comment or to ask or answer a question.
- **Sharing control of the training session:** The session host can assign control of the session to a panelist or participant so they can advance PowerPoint slides, share documents, etc.
- **Whiteboards and annotation tools:** The facilitator and participants can write notes, draw diagrams or mark up content (highlighting) on a virtual whiteboard, as well as on PowerPoint slides and shared documents.

- **Application sharing:** Participants can take turns editing a shared word processing document or a spreadsheet.

What about the audio? Some web conferencing services offer integrated VoIP as an alternative to a traditional phone line. In this case, the host and participants need to rely on built-in audio equipment (speakers and microphone, or headset) or attach these components to their computer. Otherwise, a separate phone connection and conference call service are required. Make sure you understand the conference call pricing. Some free services exist, such as Skype and FreeConferenceCall.com.

Do you need a recording to share later? You may want to record the webinar and post it online so others can download the recording or view it through streaming playback. You many need to ask the web-conferencing vendor to post the recording, or you may be able to do it yourself. Make sure you have a clear idea of who might access the recording so you know if it is worth taking the time to create and post. If you want to record synchronized video and audio then you will need to use either integrated VoIP for audio or attach a recording device to your telephone and computer (e.g., Dynametric box).

> **!** Check out the guide to software and services at http://thinkofit.com/webconf/realtime.htm and *Idealware's* A Few Good Online Conferencing Tools, http://www.idealware.org/articles/few-good-online-conferencing-tools-0 for discussion by nonprofits and professionals about affordable options.

Human Technology support. Don't do it alone if you don't have to. If you are unfamiliar with web conferencing, this will be crucial to your success. Find a colleague or volunteer, a "techie," comfortable with technology, and in particular, knowledgeable of the web conferencing software you plan to use and make that person a part of your team.

Other Distance Learning. Web conferencing training is often supported by multiple media: through e-mailing documents to participants before or after the training, referring participants to website materials and by using social media sites (e.g., Facebook) to post comments, share photos and web link, or get updates.

TIP	***Are they good candidates for online learning?*** Provide a questionnaire to assess whether your training participants are good candidates for online learning. See the resource section for a sample of a Participant Electronic Readiness Questionnaire.

Q ***5. How can I try out web conferencing software and features right now?***

A Good news! Web conferencing vendors are anxious to let you see and try out their products—right now, for free. Most offer quick and easy sign-ups for free trials (2 weeks, 30 days), easy steps and short videos to introduce you to the features, and the capability to start web conferencing with a group immediately. There are many out there; here are a few to consider: AnyMeeting.com (free), FuzeMeeting.com, GoToMeeting.com, Globalmeet.com, iMeet.com, join.me and Webex.com.

Get on and try out some of the features by inviting others (colleagues, a volunteer or two) to an online meeting. Share a document, create a poll or "chat" with one another. Once you feel comfortable, you might want to schedule a meeting with your volunteers (or volunteer stations) and introduce them to web conferencing.

The vendors want you to have the best experience possible so feel free to try out a few of the web conferencing services and use their technical assistance line or e-mail to ask questions. Explore the quality and timeliness of their technical assistance, as that is another important consideration.

Q ***6. I've got the technology, now what do I need to do to prepare for a web conference (webinar)?***

A Now that you've decided to do a webinar, start your planning a month before the training. It's also wise to begin registering participants 3-4 weeks before your training. (See the Preparation Checklist at the end of this Chapter.) As is the case in face-to-face training, preparation makes all the difference!

✓ **Recruit your team!** It is possible for some facilitators to "do it all" by themselves, however, it is recommended that you assemble a team for web conferencing training. This is especially true if you and/or your participants are new to doing webinars. You may want to consider the following as roles for your team members. Bear in mind, some roles may be combined or split as a result of comfort or necessity!

- **Organizer.** The organizer schedules the training, sets up and tracks the registration, and communicates with the participants and, if applicable, other presenters.
- **Facilitators/presenters.** These persons will focus on communicating the subject matter, including any material preparation (slides, exercises), presenting the content and fielding questions from participants. They may also respond to the chat or other online communications.
- **Technical Support.** Technical support will focus on answering the technical and logistical questions associated with webinars ("I can't get on!") and troubleshoot with participants as they log on and learn the software. This

allows the facilitator to address the content and group management. The technical support person should have a separate phone number so he or she can answer questions and assist participants having difficulties. This person may also monitor the chat area to resolve technical issues without disrupting the group.

TIP	***Alternative contacts.*** Make sure all of those assisting with the webinar can be reached offline. Have a cell phone close by or some other method to get in touch.

- ✓ **Participate in webinars**. If you haven't done so already, attend some online training sessions to get a feel for what they are like. You will undoubtedly pick up some training ideas and develop a better understanding of what works (and doesn't work) for participants.
- ✓ **Review and modify the agenda and PowerPoint slides**. The modules in the two curricula are designed to be 60-90 minutes. It is recommended that you keep the webinars to that same time period. However, it is best to schedule more time than you think you will need so that you don't rush learning and can address technical issues. Therefore, consider what pieces the participants can do before the training on their own or with a buddy over the phone on another day. Try breaking a module into two separate workshops

TIP	***Make modifications to the slides for web conference call.*** The curricula come with PowerPoint slides, however, for the webinar, add an introductory slide with the log in to the conference call and the time the webinar begins. Post that slide 15 minutes before you start, as someone might log on but forget to call. Consider including the facilitator's photograph on the introductory slide and maybe a warm-up question for the group. If the facilitator is unknown to the group, include a small bio.

- ✓ **Develop** facilitator **notes.** Use your copy of the curriculum module to note the activities that are happening during the webinar. For instance, note what the facilitator is saying and doing, what another team member might be doing (e.g., "put up poll #1") and the timeline markers at key slides (e.g., "5 minutes left").
- ✓ **Dress Rehearsal.** A week or two before the webinar, make sure you and your team mates and a few willing friends or colleagues ("participants") do a test drive. This is more than a conversation about the session; this would include:
    - Logging on
    - Calling in
    - Loading and presenting slides
    - Trying out interactive features (chat, raise hand, whiteboard, document sharing, etc.)

Make this as realistic as possible; practice what you will say. For those playing the role of participants, ask them to tell you what they see—or don't see—what they hear and whether they encounter any challenges using the interactive features.

✓ **Prepare technical assistance and back-up plans.** Make sure you have written down who will do what for technical assistance issues. In addition, have a back-up plan in case you run into technical difficulties. One easy solution is to e-mail PowerPoint slides and other materials to participants beforehand so they can follow along using these materials if they are unable to get on the web conference.

Q 7. *How do I prepare the participants for a web conference?*

A Preparation of participants is absolutely the most important piece to ensure a smooth training process of any kind and it is even more so with new methods. To make certain that you prepare participants for maximal engagement, consider the following steps:

Step 1. Distribute clear, step-by-step instructions to participants on how to register and how to test their computer beforehand to resolve any software compatibility issues. Most web conferencing services require participants to download and install software and provide a way to automatically check a participant's computer for compatibility. Ask participants to do this at least one day in advance of the training. The web conferencing service should provide a phone number for technical support to help participants complete software installation and system checks. The session invitation you send to participants should include the following information:

- Brief statement of the topic, date and time
- Webinar login instructions
- Audio or teleconference access information
- Phone number for assistance (include the webinar company's technical support or your technical support team member)
- Tips on participating in online training and any preparation activities
- Attachments, such as the PowerPoint slides and exercises

TIP	***E-mail a reminder.*** One or two days before the training, re-send the session invitation to all participants.

Step 2. Provide an orientation to online learning. If your participants are brand new to web conferencing, you may want to arrange a 15-20 minute orientation session. During this orientation, participants can test out how to log on to a web conference and can get comfortable with various features, including feedback mechanisms like polls and chat. Invite participants to:

- **Check equipment and technology.** This would be the time to check computer and phone equipment, make sure the software is installed properly and troubleshoot technical difficulties, test the audio (Does the headset work?), and the slides. (Can participants see them?)
- **Learn the web conferencing features.** Take participants through the features you will use during the webinar and have them try out these features. Make it fun and encourage exploration.
- **Make introductions**. If participants have not met before, use the orientation as an opportunity for the group to get acquainted. Again, this can be done in fun and creative ways using chat, whiteboards or other features.
- **Learn ground rules: expectations and full participation.** The online learning environment requires some group norms. Use the orientation to explain ground rules and expectations for participation (e.g., do not disturb sign, remove distractions, close e-mail, turn off cell phones, etc.). (See Question 9.)
- **E-mail or post materials beforehand**. Participants learn best when they know what to expect. Help participants prepare for the session by e-mailing or posting materials several days prior. Send an e-mail that includes documents, PowerPoint slides, and links to any resources (e.g., video link, worksheet) participants should be aware of before the training session.

TIP	***Solve problems through careful planning.*** If everyone has the materials in hand, you will be able to forge ahead even if technical problems arise online. Number your PowerPoint slides and call them out by page number or title as you advance through the presentation, so anyone not on the web conference (audio only) will still be able to follow along.

Step 3. Encourage attendees to sign in 10-15 minutes ahead of the scheduled start-up time and have technical assistance ready. Just as participants wouldn't walk in exactly when a workshop starts, so too, they need a few minutes to settle in for a webinar. Have a warm-up exercise ready as people come on.

Q 8. *What should I do the day of the web conference?*

A In hosting a webinar, consider preparation of your physical environment, your technology and the content.

✓ **Do** not **disturb.** Make sure you have a quiet spot. Ideally, find a room with a door and put a "do not disturb" sign on the door while running a webinar.

- ✓ **Keep hands free**. If you have a good hands-free headset for your phone, use it so you can move freely. Avoid using the speakerphone as that will lower audio quality.
- ✓ **Log on 20 minutes early.** Have your webinar equipment ready to go and any other presenters on as well.
- ✓ **Call-in 15 minutes before webinar.** Be ready to greet participants and check in on their progress as they log on, and ensure that they received any materials e-mailed earlier.

TIP	***Recording?*** If you decide to record the session, be sure to set up the recording equipment and don't forget to click the record button once you let the participants know you will be starting. Wait until the session gets officially underway to start the recording.

- ✓ **Mute.** It is accepted practice to ask participants to mute their phones when not talking, especially if they are using a speakerphone that may pick up distracting background noise. If background noise persists, you, as the facilitator, may want to mute all lines until the time for group participation or discussion.
- ✓ **Welcome**. Formally welcome participants and set out the agenda and expectations, ground rules (i.e., how you will address questions), and how long you expect the webinar to last.

TIP	***Respect participants by beginning and ending on time (or early!).*** Establish a culture of punctuality by starting on time. However, plan a cushion of time, just as you would in a face-to-face training. Be ready to send any latecomers to an assistant to be brought up to speed. *If you cross time zones, make sure you are clear about the meeting time.*

- ✓ **Don't talk technology.** Take care not to apologize for bandwidth issues and technology problems. Yes, you do want to address real issues but repetitive apologies for small glitches puts the focus on the technology, not the learning.
- ✓ **Closing and Follow-up.** Close the session by thanking the participants for attending.
    - Give both verbal and written information about how the feedback survey (see Chapter 5) is to be completed (phone call, e-mailed survey, online survey or the polling feature immediately after the session).
    - Remind them of follow-up work or conversations.
    - Note how they might get additional help/information.
    - Keep the conversation going by posting or e-mailing promised resources and materials.
    - Send out the links or materials highlighting the training points, recordings, websites, etc.
    - You might even offer to continue the discussion online.

9. *What are the ground rules or shared agreements for participants?*

The online environment needs a few ground rules. Here are some suggestions for participants that will assist in developing an effective learning environment.

Sample Ground Rules

1. **Turn off unnecessary electronics.** That means e-mail, instant messages alerts and cell phones.
2. **Create a physical space for learning**. Clear other distractions away from your training area such as social networking sites, the report you're working on or that colleague who is trying to get your attention.
3. **Prepare to participate.** Participate fully and, if there is low participation, be ready to be called on by name. The facilitator can't see you so be prepared to respond.
4. **Speak up, ask questions and make comments**. Use your voice, "raise your hand" or use other features (chat) to jump in. If you have an immediate question or comment, put it in the chat area but also be patient as the facilitator may take a while to get to your chat messages.
5. **Mind your manners.** If you leave the session, send a chat message to the trainer and let them know. Don't put the group on hold, instead mute your line.

10. *How do I keep participants engaged using web conferencing?*

In a webinar, you lose visual cues—the glazed over looks of boredom, confused or frustrated expressions, nods of agreement—and can overlook participants who are not interacting. However, what you already know about keeping adult learners engaged applies here too. Keep in mind a participant's basic motivation—to build on their existing knowledge, to find new strategies to best serve the client (child, youth or senior) and to share with peers in the process. You'll need to work harder to tune into more subtle cues and keep the training interactive in the virtual world, but it is possible.

Acknowledge that it is important that the learners be self-motivated and self-disciplined as they prepare for, get on, and follow-up with web conferencing. Although this fits well with adult learner characteristics, we all know adults also often over commit themselves.

To make the experience as interactive as possible, you can:

- ✓ **Call out and call on.** At the beginning, if it is a small group, you may want to call out the participant names to invite folks to introduce themselves instead of a free-for-all. Likewise, when you pose a question to the group and there is silence, use the participant list to call on people. Let participants know they might be called on and they will tend to pay attention and limit distractions. As you go through the training, keep track of who has not responded and try to make sure you give everyone a chance. You want to give folks a few seconds to respond anyway, but in addition, be aware that participants may hesitate before speaking to avoid interrupting or speaking over each other.
- ✓ **Keep it personal**. Learning happens as a social activity. Use participants' names; recall what was said earlier to reinforce a point.
- ✓ **Use your voice.** Without visual cues your voice becomes more important than ever. Slow down and speak clearly. Vary your voice tone and energy to keep from falling into a monotone. Use humor. Smile and use the same hand gestures you use in on-site training. The participants won't see them, but they will come through in your voice.
- ✓ **Alter the way you ask questions.** Instead of asking, "Any questions?" give the participants specific opportunities to engage. You could say, "Raise your hand if you have a question" or, click "yes" if you are ready to move on.
- ✓ **Mix it up.** Just as you are encouraged not to lecture too long during face-to-face training, so too, you will want to talk for a few minutes (less than face-to face) and then offer an activity or chance to respond. Vary your interactive strategies.
- ✓ **Build rapport.** Put you picture on the first slide and introduce yourself. With a small group, use verbal introductions. Put up a poll and ask participants to respond to it.
- ✓ **Do something!** To avoid simply staring at a computer and passively listening, or multi-tasking in areas unrelated to the topic, help participants take advantage of new ways to let the facilitator know they are "there" and to engage meaningfully with the material and their peers. Every time participants use the chat window, "raise the hand" icon or other feature, they are staying attentive and focused. Take advantage of the special tools not available in a face-to-face setting such as chats and application sharing. Don't forget during your orientation to online learning to prepare the group to use the different features. Then, make sure to incorporate those into your training as well. These interactive features provide feedback, check pre-training knowledge, and let you know the group is still with you.
- ✓ **Anticipate "dead air" time.** As participants log on or an application is loading, keep participants from jumping to some unrelated activity, by asking someone to give their insights into an assignment or provide a quick question for participant response. Remember, this is your opportunity to help the group warm-up to the topic and each other as you develop a learning community.
- ✓ **Encourage questions and give multiple opportunities for participants to chime in.** If you feel verbal questions will break up the flow during certain

segments, ask the participants to use the chat window. Don't forget to review the chat comments!

Q 11. How do I use the interactive exercises during a web conference?

A Some interactive exercises from the curricula or other face-to-face trainings can work quite well in an online training session.

- ✓ **Large group call-out.** This easily translates to the online training. For instance, if you ask the group a question such as, "What types of concerns do you have working with 6th grade youth?" they can respond by speaking their responses, or writing them in the chat window. You could also create a poll to gather the information.
- ✓ **Individual reflection worksheets.** Worksheets can be e-mailed or posted online beforehand and completed before or during the session. If you tell participants that you will be discussing their responses, make sure you do so!
- ✓ **Pairs or small group exercises.** This is the most challenging method. While small groups cannot easily form during the training, one way to handle this is to create pairs prior to the training and have these pairs use instant messaging or a private chat during the training or have a phone conversation prior to the training.
- ✓ **Polling.** Online, you can create a question that allows participants to "vote" on the response. It may be to confirm knowledge or to gather opinions. This is a great way to open up a dialogue within the group. You can send polls ahead of time or participate in them in the moment. And polling is a great way to immediately share the results with the group.
- ✓ **Brainstorming.** Post a question online or on a slide and invite participants to take a minute or two to brainstorm possible answers or solutions. Participants can verbally respond or write in the "chat" window to quickly "popcorn" responses and build off each other's answers. You can also use a whiteboard already typed and copy and paste chat responses and type in verbal responses. This allows the individual responses to be shared with the group in a collaborative exercise and deepen discussion. You can save the information and share it with the group.
- ✓ **Same-time discussion.** Some people find it helpful to have an initial discussion, then time "offline" to complete some of the work, and then a summary same-time discussion. Create a time where everyone agrees to be online or on the conference call at the same time. You can then use a "mixed" environment. With some training done prior to the talk and some happening in the moment. This will increase accountability for completing the material and often will spark new interests.
- ✓ **Guest lecturer.** Spotlight a voice from the group, maybe one that has not been heard or offer an "expert" to provide information or field questions. A new voice can often add new energy. Those individual presenters who would not be able to travel to your site due to cost or time may be quite willing to call in.

- ✓ **Participant-moderated discussions.** Invite interested participants (veteran volunteers, partner agency experts) to moderate a portion of the discussion. They can then take responsibility for initiating discussion, interacting with participants, and providing summary remarks.
- ✓ **Personal journal writing**. Provide space within the environment for each learner to write personal reflections or reactions to readings, discussions, or other learning experiences. This may be a blog or just a shared space to post (e.g., Wikispaces or LiveJournal).

12. What if my volunteers don't have a computer and/or Internet access?

If many or most of your volunteers don't have access to technology, you will want to limit your distance learning methods to the phone and mail. Continue to consider how to use conference calls and other mailed material to supplement any on-site training.

However, your volunteer stations or other community partners which host volunteers may be good candidates for distance learning. Furthermore, they might even be able to "host" a remote training at their site by gathering the volunteers together in a conference room with a screen and speaker phone.

13. How do I know the distance learning format is working?

Just as you would do in a face-to-face training, assess your participants' experience with web conferencing and find out their satisfaction with the training, learning and predicted use of the information.

See Chapter 5 for a simple feedback survey that could be e-mailed or put into an online survey format (e.g., SurveyMonkey, Zoomerang). Many distance-learning software packages also allow you to poll participants and of course, you can also use the text box for responses to questions you might pose. If you want to assess their knowledge and currently use a quiz or test, this can be a shared document or emailed to participants.

Especially in the early days of using distance learning, consider informal conversations with those you believe might have the most trouble with or resistance to the medium and find out what is working for them and what is not.

References & Additional Resources

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- Facilitating Online Training. This is an online manual with hints and tips for the facilitator of an online training. http://unexlabs.unx.uci.edu/webex/Facilitating_online_training.pdf
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- Shank, Patti, Ed. *The Online Learning Idea Book: 95 Proven Ways to Enhance Technology-Based and Blended Learning*. Patti Shank (Editor). John Wiley and Sons, Inc. (Pfeiffer) 2007.
- TechSoup is a nonprofit that helps other nonprofits and public libraries get the technology resources they need to operate at their full potential. www.techsoup.org.They have many articles in their learning center on web conferencing including: *Tips for Conducting a Successful Webinar* (2009) Griffiths, K & Peters, C; *10 Steps for Planning a Successful Webinar* (2009) Griffiths, K & Peters, C.; *Running Effective Online Trainings* (2006) Beadlko, L.

- The American Society for Training and Development has an orientation PowerPoint that could be viewed by participants to help orient them to the experience and enrich that experience. http://www.astd.org/content/education/certificatePrograms/elearningonlineresources/E-LearningResourcesCourseMaterials.htm
- The Resource Center has tools and online training for volunteer and National Service Programs. www.nationalserviceresources.org. The effective practices section includes: *Hosting a successful web conference* (2007) Education Northwest.
- United States Distance Learning Association. This agency serves the distance learning community by providing advocacy, information, networking and opportunity in the areas of trends in learning—distance learning, e-learning, mobile learning, computer-based training (CBT), web-based training (WBT), instructor-led training (ILT), online training, online learning, blended learning, classroom training, webinars. http://www.usdla.org/
- University of Illinois Online Resource. This is an online resource for learners participating in online learning. http://www.ion.uillinois.edu/resources/tutorials/pedagogy/studentprofile.asp
- University of Washington Online Handbook. This is a resource from the University of Washington with tips and resources to facilitate online discussions. http://www.outreach.washington.edu/teaching/online_handbook_files/facilitateDiscussions.html
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Additional Materials and Resources

Chapter 4: Distance Learning and Web Conferencing

1. **Preparation Checklist**
2. **Participant Electronic Readiness Questionnaire**

Preparation Checklist

To Do	Person Responsible	Deadline Date	Completion ☑
ONE MONTH BEFORE TRAINING			
Meet with team. Identify responsibilities.			☐
Make sure computer used for web conferencing is configured with necessary software and Internet access.			☐
Test technical (i.e., software, hardware, phone) under the same conditions most participants will encounter.			☐
Schedule webinar session using your web conferencing system.			☐
Develop participant procedures for registration and support process.			☐
Send out webinar invitation and registration info.			☐
Establish group norms or electronic etiquette.			☐
Plan for an alternative if the technology fails.			☐
TWO WEEKS BEFORE TRAINING			
Double check that all participants are registered for the session. Remind them to run system checks and install any required software.			☐
Conduct orientation session to train participants to use webinar system.			☐
ONE WEEK BEFORE TRAINING			
Send reminder to participants with registration information. Make sure they have all necessary material. Remind them to complete any exercises prior to the session, if applicable.			☐
Finalize webinar roles and responsibilities with your team or other presenter.			☐
Develop any material to be accessed during session.			☐
Review material and practice!			☐
Develop technical assistance plan to address minor technical issues (e.g., who will handle what, phone numbers, etc.).			☐
Develop back-up plan.			☐
Do a dress rehearsal with your team to run through the agenda and troubleshoot technical problems. Invite a few folks to serve as "participants."			☐
Optional-Secure a second computer for you or your team to use as a "dummy" participant so that you			☐

To Do	Person Responsible	Deadline Date	Completion ☑
can see what participants see.			
Put your evaluation form into an online format or have it ready to e-mail after the session			☐
1-2 DAYS PRIOR TO TRAINING			
As a reminder, re-send registration/login information so participants have it handy (links, dates, time).			☐
Prepare documents (put in PDF format) and e-mail to participants. Include the PowerPoint slides.			☐
30 MINUTES PRIOR TO TRAINING			
Get your cup of coffee or glass of water! Put "do not disturb" sign on your door.			☐
Set up, log on and open the PowerPoint slides and other documents you will be viewing with participants.			☐
Ask partner (the techie) or colleague to log on and check participant interface.			☐
Have hard copies of registration list, phone conference information, and other documents that will be presented.			☐
Dial into conference call 10-15 minutes before time (if applicable). Greet participants and troubleshoot technical difficulties.			☐
Set up webinar recording, if applicable.			
AT START OF TRAINING			
Before beginning, ensure that all participants have joined the session.			☐
Create space for participants to introduce themselves in a post to the chat window as a first exercise, with perhaps a photo or a personal detail.			☐
Start recording webinar, if applicable.			
Formally welcome participants and set the scene to help participants understand the purpose, expectations, and details of the experience including how you will address questions.			☐
At the end, formally thank participants, provide next steps (i.e., have them complete feedback survey online) and recap any document exchange or follow-up work.			☐
End recording webinar, if applicable.			
Log out and hang up.			☐

To Do	Person Responsible	Deadline Date	Completion ☑
FOLLOW-UP/AFTER TRAINING			
Thank participants and send or remind them of completing feedback survey.			☐
Follow-up with resource requests or additional training material promised or specific questions.			☐
Collect feedback, enter it and discuss it with team to improve next webinar.			☐
Review and post recording. Send recording link to group.			☐

Participant Electronic Readiness Questionnaire

Although distance education is supported by the same learning principles as in-person training, there is some information that will be helpful to us to determine the best match and type of distance learning. Please complete the following questions to the best of your ability. If you are unsure of the question, please feel free to call (*name and phone number*) for support.[8]

Technology resources:

Do you have a computer? ☐ Yes ☐ No

If you have a computer, please answer the following statements.

My computer is a ☐ PC ☐ MAC. It is __ years old.

I am ☐ not comfortable, ☐ comfortable, ☐ very comfortable using my computer.

Do you have easy access to Internet service? ☐ Yes ☐ No

If yes, do you have ☐ "dial-up" access ☐ DSL/cable ☐ T1/T3

Which web browser and version do you have? ______________________________

Learning Preferences:

Have you participated in (enter the type of learning) before? ☐ Yes ☐ No

If yes, was your experience ☐ favorable, ☐ undecided, or ☐ unfavorable?

If yes, did you have the technology to participate easily? ☐ Yes ☐ No

If yes, what, if any, problems occurred during this training?

____

____

[8] source: http://www.ion.uillinois.edu/resources/tutorials/pedagogy/studentprofile.asp

Chapter Five: Training Evaluation and Self-Assessment

Introduction

Evaluation is a systematic process of regularly seeking information from those you are serving to measure your success. With respect to the curricula, some anticipated "successes" (impacts) might be:

- Meeting the objectives of each workshop (e.g., greater awareness of the needs of elderly clients or children/youth, mastery, and confidence in working with them).
- Providing a satisfying, enjoyable learning experience for participants.
- Building a community of volunteers.

Each of the curricula's modules supports an evaluation effort. Evaluations typically encompass the following:

- **Data collection.** This involves handing out the data collection instruments (e.g., questionnaires, surveys) to participants, gathering their responses, and organizing these responses before analysis.
- **Data analysis.** The responses taken from a number of individually completed survey instruments need to be tabulated and organized in a way that makes it possible for you to draw some overall conclusions.
- **Reporting.** Conclusions drawn from data analysis of survey data are usually written up in narrative form to communicate to broader audiences. A well-written report provides a picture of how successful your training was and information on which to make decisions about future training events.

Q

1. Why would I want to evaluate the workshops, especially if it is not required?

A

Here are some reasons why doing an evaluation is worthwhile:

- ✓ **To find out what is working and what is not.** By knowing what is working, you can do more of it, and likewise, you can change what is not working.
- ✓ **To make continuous improvement possible**. By helping you see if you are on track toward achieving your goals and objectives, you will know if you need to "shift gears" (e.g., add more resources, change directions or strategy) to get where you want to go. An evaluation can provide a lot of useful guidance on what changes need to be made to do this.
- ✓ **To provide accountability to stakeholder groups.** Getting responses from participants in an evaluation can help document or report changes (e.g., new skills developed) or identify currently unmet needs (e.g., additional topics participants would like to learn about) for the benefit of future participants, collaborating agencies, program funders, public officials, etc.

- ✓ **To know thy self**. It is also important to hold yourself accountable. Did you succeed in your role as a facilitator for the group participating in the evaluation?

Even though you may think it will be hard to do, it does not have to be. A simple survey, the Feedback Training Survey, is already integrated into each of the modules, , and the steps to analyze and report your results are explained in this chapter.

TIP	***Comments along the way.*** Especially during a full-day training event, consider asking participants to provide comments on the extent to which the training is meeting their needs throughout the event so that you can make adjustments or changes as you go. This keeps you attuned to participant understanding and engagement and minimizes participant frustration by uncovering and addressing expectations early. Post a few key questions on easel paper sheets around the room with markers nearby. For instance, *"Do you feel prepared to communicate with clients? If not, what do you still need to know?"* Ask participants to stop by on their way out or at a break to jot down some quick responses.

Q 2. *What is the Training Feedback Survey?*

A The Training Feedback Survey provides answers to questions like, "*What worked for individuals? What did they learn? What would they change? How do they plan to apply the information? What else do they need*?"

Each module makes use of the Training Feedback Survey. Here are the steps to using the information from the survey.

Step 1. Familiarize yourself with the instrument. The Training Feedback Survey (instrument on page 82) allows individual participants the opportunity to candidly report their satisfaction with a training event (Items #1-6), assess their mastery of skills (#7) and their applicability (#8), and identify what worked (#9) and what needs change (#10). This is an anonymous survey. Feel free to add a few of your own questions (e.g., "What other training would you like this year? Would you provide contacts for qualified speakers in the area of…?").

Step 2. Data collection. You will want to administer this survey at the end of every module while participants' memories are fresh and not mixed with reactions to later modules. Make sure to give participants at least 5 minutes to complete it.

T I P	***Figure out a collection spot.*** Provide participants with the location of the drop-off spot to place completed surveys (box, table toward exit, envelope). Or ask a participant to gather the surveys while you leave the room for a few minutes. The goal is to provide anonymity for respondents.

Step 3. Data Analysis.

You may decide to review the evaluations and discuss the results with your team or you may need to more formally report your data. If you want to take a look at any trends or patterns, consider entering the responses on a blank survey form or an Excel spreadsheet (see sample below).

Using a Blank Survey

Put a tally under the appropriate scaled item (strongly disagree, disagree, etc.) for each response.

Training Feedback Survey (part of each module)

Please help us improve our training sessions by providing feedback on the training you attended. Thank you!

Training/Session Name:______________________________ Date:__________

Lead Trainer/Facilitator:______________________________

Program you serve with: ❒ SCP ❒ RSVP ❒ Other: ____________

Please rate this session using the following scale:	Strongly Disagree 1	Disagree 2	Neutral 3	Agree 4	Strongly Agree 5
1. The subject matter was presented effectively.	11	1	111	1111	11111
2. The facilitator was knowledgeable.		1	11111	1111111	11
3. The facilitator responded to questions.		1	111	111111	11111
4. There were enough opportunities for discussion.	111	11	11111	111	11
5. The written materials are useful.	1	11	11111	1111	111
6. The session met its stated learning objectives.			11111	11111	11111
7. As a result of this training, I gained new knowledge applicable to my volunteer assignment.		1	11111	1111	11111
8. I plan to apply what I learned at this session.		1	1111	1111	111111

Using an Excel Sheet

A. Take each survey and for each scaled statement (# 1-8) put a "1" in the box corresponding to the response. The "1" indicates that one participant answered. The sample below demonstrates responses on the first four statements for five participants.

B. For each statement, identify how many responses you received. Sometimes this is different than the total number of surveys because some participants may have skipped one or more statements.

C. You can then figure out the percentage of responses for each statement.

	Subject Matter (#1)					Facilitator Knowledge (#2)					Facilitator Response (#3)					Discussion (#4)				
	Score 1=strongly disagree 5=strongly agree					Score 1=strongly disagree 5=strongly agree					Score 1=strongly disagree 5=strongly agree					Score 1=strongly disagree 5=strongly agree				
Participant	**1**	**2**	**3**	**4**	**5**	**1**	**2**	**3**	**4**	**5**	**1**	**2**	**3**	**4**	**5**	**1**	**2**	**3**	**4**	**5**
1				1					1						1				1	
2			1							1				1			1			
3				1						1					1				1	
4			1											1				1		
5				1						1					1				1	
Total: 5	0	0	2	3	0	0	0	0	1	3	0	0	0	2	3	0	1	1	3	0
Percentage	0	0	40	60	0	0	0	0	20	60	0	0	0	40	60	0	20	20	60	0

In the case above, you could pull out an important statement (e.g., #3) and be able to report: "*All 5 participants agreed that the facilitator was responsive to questions*." or, "*Sixty percent of the participants 'strongly agreed' that the facilitator responded to questions*."

Analyzing Qualitative Data

For the **open-ended questions** or qualitative data, depending on how you want to report, you could either group them according to categories on paper or list them in an Excel spreadsheet (see sample below for question number 9, "*What did you like best about this session?"),* list them, or merely read them and note general impressions for future workshops.

Sample A on a blank piece of paper or survey (question number 9)

Information (3)
- *Great information!*
- *Loved the content!*
- *Needed to learn this.*

Sharing Ideas (2)
- *Talking to others about what they do to deal with these issues.*
- *Small group sharing.*

Allotted Time (1)
- *Not too long.*

Materials (1)
- *Handouts*

Other (1)
- *Everything!*

Sample B in Excel spreadsheet (question number 9)

	Liked Best (#9)				
Category	**Information**	**Sharing Ideas**	**Allotted Time**	**Materials**	**Other**
Participant					
1	*Great information!*				
2		*Talking to others about what they do to deal with these issues.*			
3			*Not too long.*	*Handouts*	
4	*Loved the content!*				*Everything!*
5	*Needed to learn this.*	*Small group sharing.*			
Total: 5	3	2	1	1	1
Percentage	60%	40%	20%	20%	N/A

Step 4. Use and Report. Now that you have collected responses from participants and analyzed them, here are some ways to use it.

- ✓ **Informal Reporting.** First of all, you will want to examine the data with those who assisted with the training for clues on how to improve your training. After looking over the data analysis, you might conclude, for example, "*On the survey at the end of the session, 87% scored the facilitation team with a four or higher on 'facilitator response to questions,' but only 40% scored us with a four or higher on 'facilitator knowledge.' So it looks like we need to understand the content better before we facilitate the next training.*"
- ✓ **Brochures, Flyers, Fact Sheets, or Outreach Materials.** You may already have developed promotional materials designed to reach local communities, potential staff members or volunteers, and potential clients. When you update them, however, consider adding evaluation information from training events. For instance, in recruiting volunteers, information such as, "*97% of all our trained volunteers have reported that training offers them opportunities to increase their knowledge and discuss topics that they can then apply to their volunteer assignment*s," demonstrates commitment to quality services and support for volunteers.

TIP	***Look for "rich, thick data."*** Whether using a written or verbal assessment, look for participant observations that could be helpful in other documents and support the numbers you collect. A quote such as "*The training has helped me understand and handle my client's physical limitations,"* is an example of a quote one could include in a proposal seeking additional training dollars.

3. *What is the Facilitator Skills Assessment Form?*

This is your own "self-review." It asks you to answer questions like, "*What will I—the facilitator—do differently next time? What did I learn? What worked? Where do I need to be shored up*?"

Complete the Facilitator Skills Assessment Form after training, analyze it, and figure out what you want to improve on or keep doing well.

Step 1. Familiarize yourself with the Instrument. The Facilitator Skill Assessment Form (instrument on page 83) assists you in taking a closer look at your facilitation practices. You can use this self-reflection tool to examine ways to improve your skills and techniques for future training events.

Step 2. Data Collection. After a workshop, complete this instrument to track your strengths and document any challenges you encountered in facilitating the training event.

Step 3. Data Analysis. This instrument asks you, the facilitator, to assign a numeric value to each statement denoting how prepared you believed you were. The total score determines overall preparation: the higher the score, the stronger your perception of preparation and competence. However, the overall score is less important than identifying your strengths and weaknesses. Look at your top scores (the 4's and 5's) to see where you think your strengths are, and at the low scores (the 1's and 2's) to see where you may feel that you need improvement. If there is an item that was not pertinent to your training, eliminate it from your analysis.

Step 4. Use. This self-assessment is not really designed for reporting purposes, but for your use. However, you might want to share with others what you believe to be your strengths and ask for additional assistance in areas you have identified as challenging. You could use this self-assessment to support your request for additional training from your supervisor: "*I noticed that I am really strong on content, but not as confident when it comes to experiential activities. I see that at this upcoming conference we are attending there is a workshop on facilitating experiential activities. I would like to attend. What do you think?"*

TIP	***Facilitate the training with a colleague.*** If you have an area that you have identified as a challenge, invite a colleague or senior volunteer to co-train with you next time, or have them coach you through a particularly difficult training segment.

References & Additional Resources

- American Society for Training and Development is a professional organization for those who train and facilitate adults, especially in business settings. Many resources are available on their site. www.astd.org
- Connell, J.P., A. C. Kubisch, L. B. Schorr, and C. H. Weiss, C.H., eds. *New Approaches to Evaluating Community Initiatives: Concepts, Methods, and Contexts*. University Publishing Associates: Lanham, MD, 1995. This book provides theoretical information regarding evaluation.
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- Crane, T. *The Heart of Coaching: Using Transformational Coaching to Create a High-Performance*. FTA Press: San Diego, CA, 1998. This book provides a foundation on coaching adult learners as well as hints and tips.
- This website is a link to the Evaluation Toolkit: A User's Guide to Evaluation for National Service Programs. http://nationalserviceresources.org/resources/online_pubs/perf_meas/usersguide.php
- This website provides information about experiential education philosophy, theory, research, and evaluation. www.wilderdom.com
- The Online Evaluation Resource Library provides links and resources to assist programs in evaluation. www.oerl.sri.com/
- The Outcome Measurement Resource Network provides links and resources to assist programs in evaluation. http://www.unitedway.org/Outcomes/Library/interven.cfm
- Vineyard, S. *Evaluating Volunteers, Programs, and Events.* The Points of Light Foundation Catalog Services: Baltimore, MD, 1988. This book provides basic ideas, resources, and examples to assist programs in evaluation.
- W.K. Kellogg Foundation Evaluation Handbook has an overview of evaluation, resources, and examples to assist programs in evaluation. http://www.wkkf.org/Pubs/Tools/Evaluation/Pub770.pdf

Additional Materials and Resources

Chapter 5: Training Evaluation and Self-Assessment

1. **Training Feedback Survey**
2. **Trainer/Facilitator Skills Assessment Form**

Training Feedback Survey (part of each module)

Please help us improve our training sessions by providing feedback on the training you attended. Thank you!

Training/Session Name:_______________________________________ Date:____________

Lead Trainer/Facilitator:____

Program you serve with: ❒ SCP ❒ FGP ❒ RSVP ❒ Other: ______________

Please rate this session using the following scale:	**Strongly Disagree**	**Disagree**	**Neutral**	**Agree**	**Strongly Agree**
	1	**2**	**3**	**4**	**5**
1. The subject matter was presented effectively.					
2. The facilitator was knowledgeable.					
3. The facilitator responded to questions.					
4. There were enough opportunities for discussion.					
5. The written materials are useful.					
6. The session met my expectations.					
7. As a result of this training, I gained new knowledge applicable to my volunteer assignment.					
8. I plan to apply what I learned at this session.					

9. What did you like best about this session?

____

____

____

10. What would have improved this session?

____

____

____

Thank You! Your feedback will help us to improve our training!

Trainer/Facilitator Skills Assessment Form

For each of the questions below, rate your knowledge and skills on the following scale:
5 = Excellent - feel fully prepared to deal with this issue in training.
4 = Very Good - feel well prepared but could sharpen knowledge or skills.
3 = Good - feel somewhat prepared but would prefer to increase knowledge or skills.
2 = Fair - limited capacity; would not like primary responsibility for this in training.
1 = Poor or Non-Existent - little or no related experience; would not want to deal with this issue in training without more knowledge or skill; or not familiar with this concept.

A. Please assess your training/facilitation and group process skills:

___ 1. Using icebreakers and energizers.
___ 2. Explaining and using learning objectives.
___ 3. Preparing and delivering "lecturettes."
___ 4. Using questions to promote discussion and learning.
___ 5. Presenting and teaching skills or concepts.
___ 6. Preparing pre-written easel paper and using easel paper during a training session.
___ 7. Using audiovisuals (overheads, slides).
___ 8. Using small group/pair/experiential/cooperative learning (role-play, scenario analysis).
___ 9. Helping groups to "process" exercises and apply this learning to their roles/assignments.
___ 10. Supporting individual or group presentations.
___ 11. Listening to/understanding member concerns and feedback.
___ 12. Helping participants use reflection time to integrate information into their assignments.
___ 13. Collecting and using feedback from training.
___ 14. Dealing with individuals who try to dominate training.
___ 15. Getting quiet members to participate.
___ 16. Motivating members and keeping them interested.
___ 17. Handling conflict in a training situation.
___ 18. Communicating confidence as a facilitator.
___ 19. Keeping a group on track and on schedule without cutting off discussion.
___ 20. Knowing when and how to modify a training agenda on-site.

Total Score: __________ (possible maximum = 100)

B. Identify the five most important skills you feel you need to improve prior to the training.

1. ____
2. ____
3. ____
4. ____
5. ____

C. Identify your five strongest skills - the ones you are most prepared to use during the training.

1. ____
2. ____
3. ____
4. ____
5. ____