

# Notes to assist Facilitators and Trainers

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**napwa**

National Association of People Living with HIV/AIDS  
PO Box 51, Newtown NSW 2042 Australia  
[www.napwa.org.au](http://www.napwa.org.au)

## 1. Why Train the Trainer?

Train the Trainer is about providing skills to people to be able to take a training session and deliver it effectively to other people. The Trainers often will meet at one location and following the session return to their own workplace and deliver the training to local people.

It has the advantage that:

- It is more cost effective
- It saves time
- It gets the involvement of a wider number of people
- It allows the Trainer to reflect local issues in the training they deliver locally
- Spreads the workload
- Increases involvement
- Improves commitment

## 2. What is training about?

It is an activity that is designed to have the following possible outcomes:

- Impart knowledge
- Develop skills
- Change attitudes
- Raise awareness

Training is not about teaching people things. It is rather about helping people to learn. As such the Trainer facilitates the learning process. The process is rather different from education in school where there is a clear teacher student relationship. In Training the participants are often very skilled in their work, and are seeking to build on that. They will often have excellent ideas on how their job can be done better.

Position yourself as a resource to assist rather than an expert.

It should also be said that training within one organisation is far more effective when the supervising line managers know what the programme is all about and support it. It is a good idea to consult with them first.

## 3. Train the Trainer works well when:

- The training is not complex
- The people being trained to train are peers

It should be remembered that training is often a start point rather than an end point. While knowledge is something that once known is usually retained, or at least people know where to go to refresh their memories, developing skills is a longer process. Train the Trainer works best in dealing with imparting knowledge to others.

Skills are about “doing things”, and they will develop the more you practice them. In a training session around skill development, it is important to start practicing the skills during the session, and then to provide the right environment for those skills to be developed through practice afterwards.

When it comes to attitude change, the process is more complicated. In some cases the changes occur over time, and in others they happen abruptly and completely depending on the individual. This is the hardest aspect of training as often you are dealing with entrenched attitudes that have been formed over many years.

In the Train the Trainer sessions participants will learn:

- Knowledge of the subject matter
- How to prepare for and set up a training session
- How to plan a training session
- Techniques in delivering a training session
- How to evaluate training

At the end of the session not only will participants have learned how to run Training sessions but they should have developed confidence in their ability to do so.

#### **4. Needs assessment**

All training should have an objective or desired outcome. It is important to define this before the training starts. However, before the objective can be set, it is important to assess the needs to make sure that the objectives you set relate to them. These needs will have been identified as follows:

- From management observation
- Through the performance review process
- Through discussion between staff and management
- By staff themselves, recognising what they need to be able to better perform their jobs
- Using questionnaires
- From Group discussions

In the design and delivery of the session the Trainer should consider:

Previous training that the Group and individuals within the group might have undertaken

The contribution of previous work experience

#### **5. Setting the objectives for the Training**

The objective will include one or more of the above mentioned categories of knowledge, skills, attitudes and awareness. Try to make these objective as close to SMART goals as possible. You must ask yourself how you will

determine whether the objectives set have actually been achieved. This is easier when included in the objectives there are activities that can be measured.

The best training sessions are those which have only a small number, two or three, key objectives. This allows focus on the priorities.

## 6. Know the audience

How you structure and run the session depends very much on the participants themselves. The same training session on the same subject might be run quite differently depending on the audience. These are some of the things to take into account:

- Previous knowledge
- Literacy
- Language fluency
- Socio-cultural background
- Conflicts
- Any issues that exist in the Group
- Whether they know each other/are coworkers
- How many people will be in the Group

## 7. Planning the structure of the training session

It is always better to move from what is known to the participants to that which is new. Be clear in your own mind how you are going to move from the start through the session to reach your objective. There should be a clear and logical progression. It is useful to explain at the start of the session how it will be structured so that it provides context and understanding to the participants, and they can see where the session is leading.

There are several techniques that can be used to assist you achieve your objectives. They include:

**7.1 Problem Solving Exercises** to be worked on either in small groups or individually. It is better to use small groups, and take feedback from them at the end of the exercise. Make sure that the exercise itself is clear with no chance of misunderstanding or ambiguity. Make sure that the exercise itself is relevant to the subject matter, and that you have a clear idea of how it fits into the development of the session towards the objectives.

**7.2 Presentation of ideas.** Listening to someone else speak is probably the least effective training method, but it is often the most used (it is easier for the trainer, especially if the trainer is very familiar with the material.) The degree of learning is possibly involved with the amount of activity and involvement. Listening requires little involvement or energy to be expended. Reading requires a bit more, and is somewhat more effective in retention rates, and writing requires more still. Getting people to summarise what the material was

about and what the key points were, is very effective in making sure that understanding and entering into memory have taken place.

Do not deliver too much material at a time. Keep it as short and simple as possible. Use clear language so that participants can concentrate on the meaning without having to understand complicated language. Use overheads that summarise the key points to assist reinforcement. Be very sure in your own mind on the key message you want to deliver, and concentrate on that.

If there is more complex material you need to deliver, remember that they will not retain it all. So make sure they know where to go back and refer to it later. That is why in such cases notes they can take away to refer to later can be useful.

The main secret of presentation is this:

## **Tell them what you are going to tell them**

### **Tell them**

### **Tell them what you have told them.**

**7.3 Discussion.** This is a very useful technique in finding out what the participants think and whether they agree with you. It can also be a good way to generate ideas, especially since they will have the most experience about their work of anyone involved in the session. Start with a more general question and follow with questions in such a way that it develops the theme you are addressing. Your questions should give direction.

In a larger Group of people who do not know each other well, or in some cultures where it is less common to be keen to express opinions openly, you may find little initial reaction. In such cases, divide the larger Group into three's and four's, and get them to nominate a spokesperson to tell the larger Group what they discussed and what their conclusion was. This is preferable to you nominating a person.

Be prepared to draw out the issues through further discussion. Examine responses by drawing out the reasons for the response and the implications. If differing views exist encourage dialogue. If it is important to your overall objective to reach consensus, work towards achieving it. Otherwise accept the diversity of views.

Guide the discussion so that issues become clearer rather than more complicated. It can be very useful to write up the key points, paraphrasing and summarising the Group opinion. If the Group seems to be straying from the subject, bring them back to the issue to be discussed.

In any Group there will always be those who are quicker to express their opinion. However it is most important that you involve all participants and

bring them into the discussion. It can be useful to establish some Group ground rules. They might include items such as confidentiality, time limits and mutual respect, with the overriding thought that there are no right or wrong answers. Every opinion is valid.

**7.4 Games.** These activities are fun, and can break up a session well. Make sure that the games you select have a learning point, and that you are able to summarise what happened at the end by making that point.

**7.5 Role plays.** They are never reality of course, but they are a very good technique in developing practical skills. Clearly the best way to develop skills is performing them in a real life situation and learning from that experience. (Then it can be useful to have someone accompany the learner so that afterwards through discussion they can both learn from what happened.) This is known as “on the job training”.

But such techniques are not of course available in the formal training environment of running a Group session. Role plays in the training room are the next best thing.

Many people fear role plays. They are perhaps afraid of performing badly in front of their peers. It is critical to stress that role plays are about learning and not at all about assessment. How people perform in role plays is a very unreliable indicator of how they normally perform on the job. To start with you are suggesting new techniques which almost certainly will not work so well the first time you try them. It is most important to stress this, and to make sure that you run role plays in as non threatening way as possible:

- Explain that role plays are about learning not assessment
- The people in the role play can start or stop whenever they want, it is under their control
- If the players do not know what to do or say next, they can stop and ask for help
- The role play actors comment first on what happened, especially anything they would change
- Ensure that in your own summary there are some positive aspects to build on
- Do not let the rest of the Group indulge in destructive criticism
- Summarise the learning points

Role plays can also be useful in debugging an actual situation you are to face. For example if you are going to make a real presentation to a Donor, it can help to perfect the presentation by role playing it beforehand.

**7.6 The video option** It can be powerful for people to be able to see how they come across by filming role plays. However, do not replay the whole sequence, but rather sit by the camera, note the counter number of specific learning points, and only show those. Otherwise it gets boring. Always tape over the material to make sure that it is not available for others to look at after.

**7.7 Quizzes.** A useful technique to help people learn knowledge. One fun way to achieve this is to divide the Group into teams, ask questions in sets of say 5, allow each team five minutes to provide their answers. These are then marked while the correct answers are given and the scores recorded on a whiteboard. This way each team can see how they are doing. It become quite competitive and good fun. It works best when the teams are given the general subject matter so that they can prepare. An upcoming match is great at motivating people to learn about a subject. Another technique that can be used is to allow each team to set 5 or 10 questions for the other. In looking for the “trick” questions, or the ones the other team will “never know” the team members really delve into the subject, learning as they go.

**7.8 Questionnaires.** These can be useful in terms of assessing attitudes and checking what people currently think, or how they operate. It is quite likely of course that people will not tell the truth especially if their answers are made public. But that is less important than getting them to think about the issues raised in the questionnaire. It is useful to go through the questionnaire afterwards and discuss the matters raised.

**7.9 Relaxation exercises.** There is a limit on how long people can concentrate. It is a good idea therefore to have a few exercises to use at the start of a session, or to break it up in the middle. They usually take a few minutes only and are generally fun. You could for example get people to sort out the order through the year of their birthdays and stand in the chronological order, starting with that person whose birthday is closest to January 1<sup>st</sup>. But make it more fun by not allowing anyone to speak! These exercises are best when they make people get up and move around.

## **8. Session content**

Most sessions will comprise:

### **Introduction**

**The main part of the session, including all the techniques described above**

### **Conclusion**

#### *Introduction:*

To break the ice it is a good idea to introduce yourself and provide a little background if you are not known to the participants, or maybe the background to the session if they are familiar to you.

Then if they do not know each other, to get them to introduce themselves, with their name. Where they work, and what they do. It is also a good idea to get people to say what they personally are expecting to get from the training. Make sure that you let them know that you are aware of the nature and the value of their work.

In order to get participants in the right mind set for the training, it can be useful for them to do some preparation beforehand. You must be prepared for the fact that they might not do it, so do not rely totally on the preparation having been completed.

Provide plenty of time for the preparation, say two weeks. People are busy on the one hand and if you ask too early, they forget!

As part of the introduction of the session, explain what the objectives are, and what the agenda is, and how you will run it. This should orientate the participants and be presented in a way that motivates them to want to get started!

#### *The Main Session*

This will be 80% or so of the time allocated to the training. Structure it in a logical way so that it follows a progression and the participants can follow where you are leading them and why. Use the training techniques described above.

#### *Conclusion*

Time should be allocated at the end to assess what has been achieved. In some cases actions to be taken after the session will need to be identified and agreed on. These should be SMART goals with agreed and reasonable deadlines.

Any necessary follow up activities should also be defined at this point.

Written anonymous feedback can be useful in assessing whether the session was successful and taken into account in planning subsequent sessions.

## **9. Timing the session**

Whether you are running a half hour segment or a three or four day meeting you need to think about timings. Write an agenda before the meeting and circulate it to participants so that they know what to expect. Make the time and finish times reasonable, given that people may have to travel to get to the training. Allow breaks both morning and afternoon, and in between as discussed above.

Allow flexibility in the agenda and timings, so that if there is more discussion on a subject, and that discussion contributes to achieving overall objectives, time is made to include it.

Be prepared to change the agenda or activities if it makes sense to do so. Sometimes the Group will react in a way other than how you predicted. Have the flexibility to change the session to meet the needs of the Group.

## 10. Running notes

It can be useful for a trainer who has not had a lot of experience to write some notes on how the session is going to be run, with detailed instructions and timings. This gives the less experienced trainer a bit of confidence in running the session.

These notes might look like this:

### 25 Minutes Assessing needs as part of a Project

Ask	Why is it important to assess needs? <i>Possible responses:</i>
	<ul style="list-style-type: none"> <li>- <i>otherwise the project is not relevant</i></li> <li>- <i>without needs you cannot set objectives</i></li> <li>- <i>unless you understand needs the project loses focus</i></li> </ul>
State	Needs are the basis of a project. If there are no needs, there is no need for a project. If the needs are not well understood the project will not succeed.
Show V2 (overhead)	Summarise the techniques in assessing needs
Exercise 3	How would you go about assessing the needs of the Group in the exercise? Work in three's. Allow 10 minutes to complete the exercise. Take feedback. Summarise on flipchart

Etc.

## 11. Getting the logistics right

### **Here is a checklist:**

- If the budget allows it get off site, there will be less interruptions and better attendance and attention
- Start later on the first day if it allows you to save the costs of an extra night for people coming from out of town, and similarly finish at a time that allows people to return home that day
- If you use a hotel where participants are staying, demand either free training room, or reduced cost
- The room should be large enough to accommodate the Group in comfort
- If there is a lot of breakout work, make sure that there are either other rooms to use for this, or make sure that the training room is large enough to allow people to move back from the tables and discuss in smaller groups
- Rooms with natural light are better
- The facilitator should face the light back to a wall (it is hard to look at someone against the light)
- Square rooms work better than rectangular ones
- Set up the room so that the participants sit along three equal sides of a square, and the facilitator sits on the fourth side (classroom style is the worst, and boardroom style is not so good either)
- Provide tables so that participants have room to write and pay out the material they need for the session



**Here is a list of possible equipment needs:**

- Flipchart with paper for material you might want to keep, or refer to – the paper sheets can be placed round the room and collected afterwards and typed up
- “Blu-tac” or sticky tape to place paper sheets round the room
- Whiteboard
- Electronic whiteboard – these are only available in some countries, but they are excellent for training as they allow you to print off what you write on the board
- Pens, plenty of them – whiteboard and permanent pens. Use permanent on paper only. (If you use a permanent one on a whiteboard, you can remove it by writing with a whiteboard marker over the top of it, and then rubbing it out, as long as you are quick!)
- Use black and blue pens, other colours are often hard to see
- Don’t forget the screen (projection onto a white wall is possible, although often the position is not very convenient)
- Overhead projector, make sure that spare bulbs are available too, and note that some of the slim models depending on reflection are very tiring for the presenter
- Data projector – not easily available in many places, but the best way to show slides directly from a laptop
- Blank acetates and pens for additions you might want to make and for people to present material they might have worked on in groups
- Paper and pens for people to make notes
- Namecards to place in front of people on the table especially if they are either not known to each other or the presenter
- If you are going to show tapes have a VCR (or DVD for CD), and monitor. Make sure that the system is right (VHS, Beta etc.)
- Adaptors and extension leads (get the right adaptors for plugs where the system might be different in another country)

Finally it is worth saying that it is imperative that you arrive early to make sure that everything is on track. It might even be a good idea to get there the night before so that if there are problems, you have a chance to sort them out.

## 12. Notes on training techniques

Training is a skill, just like many other activities. Here are some 'tricks of the trade':

### Training hints

- Prepare well, go through the timings, think through the issues
- Make sure that you know the subject well
- You do not have to know everything, it is better to say that you do not know rather than make something up!
- Be confident, false modesty about it being the first time you have run a session is not appropriate (even if it might be true)
- If you get things out of order, or miss items out, don't panic. Just take your time and decide what to do next
- Get everyone in the Group to participate – encourage the shy ones, and hold those back who always have something to say (*hang on a second Pat, let the others have a go too*)
- Talk to the group, not to your overheads, and make eye contact with all of the participants
- Stand to the side of the screen or whiteboard as you speak, so that you do not block vision
- Be yourself, relax
- People learn when they are relaxed and have fun, so build in fun
- Use humour, then they will hang on your every word in case you say something funny again
- Vary delivery, modulate your voice
- Speak clearly and loudly enough that everyone can hear you
- Do not read your overheads, but rather talk about them
- Remain aware of the participants, are they listening, does someone want to speak?
- Change pace
- Build in a variety of activities
- Have some anecdotes of your own to add to help in explanation
- If you are not quite sure what to do next, call a break while you think about it
- Hold frequent breaks
- Be enthusiastic

### 13. Overcoming nerves

Many people feel nervous speaking in front of a group. Here are a few tips to help:

#### Settling the nerves

- Arrive early so that you have time to settle in
- Dress in a way that makes you feel confident
- Write quite detailed trainer's running notes
- Have a glass of water handy
- Find someone with a friendly face
- Get plenty of rest beforehand
- Tense and then relax your muscles
- Some people find it helps to imagine the audience naked or as pieces of fruit in a market (!!)

### 14. Handling the unexpected

However well you plan, there will always be the odd disaster happen. Here are some common ones and how you might handle them:

1. Mixed Group Expertise (high to low experience) - people don't always provide correct or sufficient information about their knowledge or experience prior to attending a course.
  - Aim at lower end of knowledge base.
  - Acknowledge the knowledge and experience of those in the "upper range". Involve them, ask them questions, to provide examples etc.
  - Split groups into "ability", "knowledge", or "experience groups" - provide specific activities.
  - Provide basic information to one group and have another group on 'problem solving or case study', then integrate groups to a further activity.
2. The person sent along who doesn't want to be there.
 

During the initial part of the session this will be disclosed or apparent.

  - Ask how they feel about being present.
  - Offer option of them leaving, "its OK by me" - usually they will stay. Ask what could make this relevant to their needs.

- Clarification of objectives should be assisted.

3. You find that you are running out of time.

- Skim topics and refer to reading list or;
- Acknowledge the problem and negotiate with group for an extension of time or;
- Provide an overview of material remaining, and seek group's clarification of what they consider important
- Offer to forward a summary of remaining material.

4. Equipment failure.

You will find everyone will be sympathetic towards you.

1. Check it thoroughly to make sure that it is not a loose connection, see if either the venue or any of the participants has any expertise in fixing it.
2. Don't spend too much time trying to fix it.
3. Apologise and remain calm. Tell a joke and move on. Use a white board to write key points from overheads. Provide written notes or a summary of what the machine would have shown, and have group discussion.