

**UCLA Center for
Health Policy Research
Health DATA Program**

**Data & Democracy
Train the Trainer Course**

TRAINER'S GUIDE AND TOOLKIT

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Health DATA Train the Trainer Trainer's Guide and Toolkit

Congratulations. You have been invited to conduct a community training workshop. The Trainer's Guide helps you design and implement your workshop.

A. How to Use the Trainer's Guide and Toolkit

The Trainer's Guide is divided into six sections and includes a toolkit. Each section contains references and worksheets that help you develop and apply skills. You will learn to train adult audiences and plan community training workshops.

1. Characteristics of Effective Trainers
2. How Adults Learn: Adult Learning Theory and Practice
3. Training Methods and Learning Activities
4. Developing a Community Workshop Training Plan
5. Conducting a Community Workshop
6. Follow-up Strategies
7. Trainer's Toolkit: References and Resources

B. Train the Trainer Learning Objectives

At the end of the Train the Trainer course you will be able to:

1. Identify and apply characteristics of effective trainers
2. Conduct a self-assessment to identify and adjust your training strengths and weaknesses
3. Identify characteristics of adult learners and apply adult learning principles to train community representatives
4. Conduct an assessment of community adult learners to identify their training needs
5. Plan, conduct and evaluate a training workshop for adult learners
6. Identify resources to develop training knowledge and skills

1. Characteristics of Effective Trainers

Introduction: What is a trainer?

A trainer is

- An expert in a knowledge area
- A facilitator of a learning process
- A coordinator of a series of activities that help participants learn

Let's look at each of these roles:

Expert in a knowledge area. Trainers serve as experts in a content area; they know how to help participants do the training activities. Participants want to learn from experts.

Facilitator of a learning process. Trainers identify learning objectives, and keep discussion and activities focused. They offer different formats for participants to learn new concepts, identify how they fit new ideas with existing values and knowledge, and apply them. Trainers protect minority opinions by creating safe learning environments for diverse audiences. They are timekeepers and make sure that people learn in a limited time.

Coordinator of a series of activities. Most training workshops involve a series of activities and learning methods that help participants develop knowledge, attitudes and skills.

Conducting a training workshop is different from a presentation. In a presentation, the information itself is the center of attention; the intention is to provide information. In a training workshop, participants **apply** new information.

Training adults means being flexible, balancing diverse needs, and offering participants ways to apply the material in a limited time.

Why Too Many Training Sessions Fail To Teach

- The trainer lectures. Participants do not have a chance to speak.
- The trainer ignores what participants want. Adults must be motivated in order to learn.
- The trainer bores the audience. To get and keep people engaged involves use of media and activities.
- The training gives too much information. Too much information is overwhelming.
- Participants are uncomfortable. The room is hot. The room is cold. The chairs are hard. Participants are hungry.

Eight Ways to Prepare For a Workshop

Here are eight exercises that can help trainers prepare for a workshop:

1. Be prepared

Take time to learn the material. Find meaningful activities that promote learning. Organize your discussion questions. Preview materials. Create back-up plans. If you do the background work, then simple exercises can help you relax and offer a successful training.

Create a routine that gives you a sense of familiarity and comfort. Get a good night's rest. Eat well. Allow enough time for traffic. Arrive early.

2. Know your strengths and weaknesses

Know your strengths and weaknesses. Some trainers are great storytellers, others excel at linking current material to the experiences of participants. Some trainers start workshops strongly and lose energy toward the end of the day, while others start slow and gain momentum. Design the training experience to maximize your effectiveness.

3. Make a list of why you can do the training

Self-doubt breeds nervousness; nervousness breeds self-doubt. If you feel insecure, make a list of examples of why you can do this.

Think about your strengths. Write down specific ways your strengths contribute to the success of the training:

- Think about your accomplishments and write them down
- Think about your knowledge of the subject matter and write it down
- Think about ways you have coached or supported others and write them down
- If you get stuck, think about why you were invited to give the workshop. What strengths do others see? Write them down.

Carry the list with you. Look at it. When you have doubts, look at your list. You may want to memorize the list and recite it back to yourself at moments when you feel insecure about your capabilities.

4. Assess participants

Get a sense of who is attending the training. What do they want to know? How many people are expected? How many agencies will send participants? What are their experiences, education and work? What are their cultural backgrounds? Why are they attending the workshop? Plan your workshop around the needs of your participants.

5. Learn something new about the subject matter

Sometimes trainers lose interest in a training topic. Learn something new about the subject matter. Find new exercises. Keep the subject fresh and interesting. If a subject bores you, your participants will be bored. Remember you set the tone for learning.

6. Be familiar with your media

Technology, audio-visuals, videos and training workbooks boost training. Know your media. Be sure that all equipment is in working order. Are the slides, videos and workbooks handy? Thoroughly checkout your equipment to make sure it is in good working order. Have a back-up plan if your equipment fails you.

7. Manage stress

There are activities you can do to control the natural stress that arises before and during the training. Here a few we recommend:

a. Physical exercises

Physical exercises help trainers relax. Here are two of our favorites.

Cross Crawl. Stand in an area where you have plenty of room. Put your arms out to your sides. Touch your right hand to your left knee. (If you can, lift your left knee up in the air rather than bending.) Return knee to ground and right arm to side. Touch the left arm to the right knee. Return. Repeat over and over again.

Another good exercise is called "lazy 8s." Draw, with finger or pencil, both hands or one, in the air or on paper, sideways eights over and over.

- b. Drink water**
Drinking water reduces stress and supports your voice. Have water at the podium. If you start to cough (or get nervous), take a slow breath and a sip of water. Be careful not to drink too much as you might have to use the restroom before the planned break.
 - c. Practice breathing**
Take a few cleansing breaths which help focus your mind. Use deep breathing before the workshop begins. Breathe in through your nose slowly for a count of eight. Hold the breath in your lungs for a count of eight. Breathe out for a count of eight (make sure the breath is completely exhaled). Repeat. Concentrate on breathing. If your mind strays, bring it back to counting and "Air in... Hold ... Air out."
 - d. Relax**
Develop stress-reducing activities. Some trainers relax with scents of sage, sweet grass and cedar. Other methods include meditation, tai chi, running, eating right and personal reflection.
- 8. Get to know a couple of participants**
Arrive early and meet a couple of participants. Greeting participants makes everyone more comfortable.

Characteristics of Effective Trainers

Review and Discussion

Read: Trainer Guide page 7, Introduction: What is a Trainer?

Review: Review the description of the role of trainers which assumes that trainers bring a wealth of knowledge and skills.

A trainer is:

- An expert in a knowledge area
 - You are the expert about your community
 - You learn new knowledge and skills regarding how to use data
- A facilitator of a learning process
 - You learn and apply principles of adult learning
 - Your knowledge of the community helps you facilitate the learning process
- A coordinator of activities
 - You coordinate activities that help reach goals
 - You coordinate activities to help your workshop participants learn

Discussion: Recall your experience with other workshops or seminars. What are some things about trainers that you think help learning? List five things you like about a trainer:

ACTIVITY #1: CHECK YOUR SKILLS

Do you know your strengths and weaknesses as a trainer? Complete the following Activity #1: Trainer Skills Checklist. Read the list of trainer characteristics and identify the ones that fit you. Circle items you need to improve then return to the checklist throughout the workshop. Note the methods you learn for improving your training skills.

ACTIVITY #1: TRAINER SKILLS CHECKLIST

Think about your own style. Does it match the following statements about trainer skills?

- **Put a check** in the box next to all of the statements you feel describe your strengths.
- **Circle the box** next to the statements that describe areas you need to improve. Think about one or two things that you could do to build on your strengths. How will you work on the areas that need improvement? Jot down your ideas for improvement at the end of the checklist.
 - You know yourself. You are confident and fully prepared. You are just nervous enough to keep alert.
 - You know your subject matter. You have studied your topic. You have experience.
 - You know your audience. You respect your participants. You listen to them and call them by name.
 - You are neutral and non-judgmental. You value everyone's experience. You value everyone's right to different perspectives. You respect differences of opinion and lifestyle.
 - You are culturally sensitive. You are aware that your cultural background shapes your thinking. You know the cultures of your participants shape their thinking.
 - You are self-aware. You recognize your own biases. You know your own "hot-buttons" and you control yourself when someone pushes them.
 - You are inclusive. You encourage everyone to participate and contribute to the group learning process.

- ❑ You are lively, enthusiastic, and creative. You use humor. You make contrasts and comparisons. You use suspense. You keep your listeners interested. You challenge their thinking.
- ❑ You use a variety of vocal qualities. You vary your pitch. You vary your speaking rate and volume. You avoid monotones.
- ❑ You use your body well. You move naturally. Your body language matches your subject matter.
- ❑ Your comments are clear and easy to remember. You present one idea at a time. You show relationships between ideas. You summarize.
- ❑ You use illustrations. You use examples, charts, and audio/visual aids to illustrate your subject matter.
- ❑ You understand group dynamics. You are comfortable with conflict resolution.
- ❑ You are flexible. You watch your participants' verbal and nonverbal responses. You adapt your plans to meet their needs. You are in charge without being overly controlling.
- ❑ You are open to new ideas. You are aware that you don't know all the answers. You recognize that you can learn from participants.
- ❑ You are compassionate. You are empathetic and understanding about participants' emotional reactions.
- ❑ You are interested in evaluating your work. You encourage feedback.

Describe one or two steps you can take to improve your skills:

2. How Adults Learn: Adult Learning Theory and Practice

Adults learn differently from children. This section reviews adult learning theory and its affect on strategic (what to do) and tactical (how to do it) issues in training.

Learning strengthens the brain, increasing connections and new pathways in the brain. This requires energy. Adult students must be motivated to exert the energy necessary to learn.

Adult learning theory focuses training more on motivating the participants and less on the content objectives. Adults learn knowledge, attitudes and skills when they are actively involved.

Fifteen Things We Know About Adult Learners

- Adults bring knowledge and their own ways of doing things to the class.
- Adults learn when they have a need to learn, not just for the sake of learning.
- Adults must connect what they are learning with their existing knowledge, beliefs and skills. Learning moves slowly through this process.
- Adults have expectations and generally know what they want from a training experience.
- Adults take fewer risks. They tend to take errors personally.
- Adults require motivation to participate in a training experience. They are motivated to learn when they see:
 - the topic as meaningful
 - the tasks are obtainable
 - the feeling or tone is positive

- Adults respond to respect and recognition. Capitalize on their experience and reward their participation.
- Adults must apply what they learn in order to remember it.
- Consider physical limitations. Never use a font smaller than 12 point – 14 or 16 is best. Sitting for too long and rooms that are uncomfortable detract from the learning experience.
- Approaches that encourage adults to express their feelings, beliefs and attitudes open them to learning.
- Adult like as much control as possible. Offer choices and self-directed exercises where they control the work of learning.

Audience Diversity

Different people learn differently. Creating an active learning experience means creating a training workshop that is meaningful for people with different values, different life experiences, in different life stages, and with different educational experiences.



Effective trainers create inclusive learning environments.

- Prior to the training, evaluate program media and examples to see if they represent the diversity of the audience.
- Do not use materials with very small writing or small print.
- Use a translator when needed. Provide background information to the translator ahead of time. Offer small group exercises in the language of the participants. Shorten lectures to allow for the time involved in translation.
- Recognize that psychological, social and cultural conditions affect a learning environment.
- Consider the systems of power (and oppression). Training sessions that include CEOs and supervisors can be difficult if the difference in power

is not addressed openly. Select appropriate course content. Build activities that require everyone to participate as equals.

- Gather as much information as possible about the audience before the workshop. Prepare exercises and information that help participants apply the training content.
- Equalize the power between yourself and participants. Recognize and value the knowledge and experience that participants bring to the training.
- Create a comfortable environment for adult learners by arranging the room to encourage equal participation.

Creating a Learning Environment

Comfort is important for adult learning. Training environments should be physically and emotionally comfortable. Uncomfortable adults resist training. Before the training session, review the agenda and the training site and make changes to promote comfort.

Some questions to consider:

- Does the seating arrangement encourage conversation?
- How is the sound in the room?
- Is there natural light? Enough light?
- Will people be able to hear and see the audiovisuals?
- Will it be comfortable for those who did not do well in school?
- Does the environment communicate respect?
- Do you have control over the room temperature? How do you fix the temperature if it gets too hot or cold?

- Will the group and planned activities fit in the space? Can chairs move to accommodate small groups? Is there an alternative space that can be used so that the groups do not disrupt each other?

- Avoid auditorium style rooms. They are designed for passive listening.
- Will participants have the opportunity to move at least once every 50 minutes?

- How should the chairs be organized?
- Are there tables for participants to use for writing?

If the space is less than ideal do not give up. By thinking about ways to arrange it, you can usually improve the space.

How Adults Learn: Adult Learning Theory and Practice Review and Discussion

Read: Trainer's Guide, pages 15-17, How Adults Learn: Adult Learning Theory and Practice

Review: The Health DATA curriculum is intended for use with adult learners. Understand the characteristics of adult learners and choose training methods for them. Review the adult learning characteristics listed on page 15 of this Trainer's Guide, Fifteen Things We Know About Adult Learning.

Discuss: How are adults learners distinct from youth learners? Recall your experience with adult learners. Do you agree with the listing of adult learning characteristics? What would you add to the list based on your experience? Which characteristics are most helpful to you to understand the adult learning experience?

You probably already know your participants. What experience will they bring to the training? What are their training needs? What are their expectations? What are their health and social concerns for the community? This information helps you prepare training materials such as data examples that are meaningful to them. Identify what they are interested in learning.

ACTIVITIES #2A and #2B: ASSESS WORKSHOP TRAINING PARTICIPANTS AND THEIR TRAINING NEEDS

Take a few minutes to work in a small group. Brainstorm with the group about who you might train and their characteristics. Develop a profile of characteristics of your workshop participants. This helps you identify training methods useful to them. Make a note those items that require you to get additional information.

Have your small group members worked with participants similar to those you intend to train? What do they know from their experience? Can they help you identify characteristics of your participants? Do you need additional information about your workshop participants? Where might you find the information that will help you know the needs of your participants?

ACTIVITY #2A: ASSESS NEEDS OF TRAINING PARTICIPANTS

Complete the Activity #2A: Training Participant Assessment Worksheet at the end of this section. The worksheet helps you think about your participants. Identify as many characteristics of your planned participants as you can. Do they have experience working with data? What about their skills, gender, age, reading and writing level? Do you plan to use computers as part of training? Do your participants have experience with the Internet? Have they worked with spreadsheet software?

Be prepared to discuss your assessment. How do you intend to get information about your participants to help plan your workshop?

ACTIVITY #2B: ASSESS WORKSHOP PLANNING NEEDS

Now that you have an idea of who you plan to train, continue to work with your small group to discuss elements of the workshop plan. Review and discuss each element of the plan to tailor your workshop for your participants. What has been your experience working with these participants? What about others in your group? Have they had experience with training or working with populations similar to those you intend to train? What have others found to be helpful to recruiting and training individuals from these populations?

Next, take a few minutes to reflect on your understanding of the characteristics of the participants you plan to train. Think of how to learn more about their training needs.

Complete the Activity #2B: Workshop Planning Worksheet at the end of this section. Identify where you have information. Place a question mark [?] where you need more information. Note how you can obtain the information you need.

Homework: Obtain information to finalize your decisions for the workshop. You need to decide location, schedule, promotion and recruitment. Talk to your supervisor and colleagues in your organization. Discuss your workshop plan with them. Get feedback and any information they can provide. How many items have you marked with a question mark? Can you find the information by your next training session?

ACTIVITY #2A WORKSHEET: ASSESS NEEDS OF TRAINING PARTICIPANTS

This worksheet helps you prepare for the workshop you are planning.

Who are your participants?

Develop a profile of who you plan to train. By understanding the characteristics and needs of your participants, you will be able to design an appropriate and useful training plan. Answer the following questions with as much information as possible about your participants. Refer to this assessment as you plan your training.

Participant Characteristics:

- Staff
- Volunteers/community members
- Both

Educational level:

Experience and skill level:

Gender and age:

Reading and writing ability (*Literacy level*):

How many participants do you expect?

- What information do you need to design training for the participants?
- What do participants already know about the subject?
- What experience or insights do participants already have?
- What do participants believe are the challenges or barriers related to the training?

- What do participants hope to gain from the training? (This includes new knowledge, skills, resources)

- What do participants prefer regarding the logistics of the training?
 - Location of training:
 - Length of workshop:
 - Optimal number of days of training:
 - Best day of the week:
M T W TH F SA SU?
 - Time of day: am or pm?

- How are you most likely to reach your audience to answer these questions?
 - Email survey
 - Fax-back survey
 - Mail survey
 - Telephone interview
 - In-person interview
 - Focus group
 - Review of previous training evaluations

ACTIVITY #2B WORKSHEET: ASSESS WORKSHOP PLANNING NEEDS

This worksheet helps you plan your workshop.

When will you conduct the training?

Day of week:

Time of day:

How long will the workshop be?

How much time do you need for recruitment of participants?

Where will you conduct the training?***What is needed?***

Room size:

Equipment:

Supplies:

Location

Is location accessible, handy for your participants? Yes No

Is it handicap-accessible? Yes No

Is the location easy to find? Yes No

Can it be reached by public transportation? Yes No

Is the location acceptable for intended participants? Yes No

What is the *purpose* of the training?

What changes in knowledge, attitudes, behaviors and skills do you hope to accomplish through the training?

What are the goals and objectives of the training?

***What* will the training involve?**

What will be the content of the training plan?

- The entire curriculum.
- The following section(s) of the curriculum:

What training tools will be needed?

- Number of chartpaper pads:
- Number of easels:
- Number of markers, pens:
- Media:
- Overhead projector for transparencies
- Projector and laptop for PowerPoint
- Meaningful data examples:
- Titles:

- Handouts, references, worksheets

What participant materials and resources will be needed?

Will there be advance work for participants?

If yes, what type of preparation is needed?

Example: Participants need to review existing community assessments prior to workshop.

How will you do it?

How will you recruit people for the training?

How will you engage participants?

How will you get feedback or evaluate the effectiveness of your training?

3. Training Methods and Learning Activities

Adults learn best with training that actively involves them. Active learning techniques are interactive and participatory, where participants engage in discussion, application or activities. The best trainers design active learning techniques that meet the goals of the training and give participants results they can use.

Phases of Adult Learning

Participatory training moves people through four phases of the adult learning cycle: experiencing; processing; generalizing; and applying. Plan to move people through the four phases at least once every four hours.

The Four Phases of Adult Learning

- 1) *Experiencing*: Doing an exercise or activity together and drawing on shared experiences.
- 2) *Processing*: Reflecting on the content; sharing observations and feelings about the experience.
- 3) *Generalizing*: Drawing meaning from the experience, comparing it to other experiences and identifying general principles or patterns.
- 4) *Applying*: Taking action, developing an action plan, and putting it to use.

Many training sessions use a lecture followed by questions and answers, small group discussions and an experiential activity. This format may be the easiest for trainers, but adults learn best when they are actively involved in ways that help them discover learning.

People remember:

- 20% of what they hear
- 30% of what they see
- 50% of what they see and hear
- 70% of what they see, hear and say
- 90% of what they see, hear, say and do

Workshop participants should "see, hear, say and do."

Tips for Active Learning

Planning:

- Be sure your activities meet the knowledge and skill levels of participants. Plan activities and modify materials for participants with different skill levels.
- Avoid lecturing. The best training draws content from participants.
- If you must lecture — use visuals. Use demonstrations, videos and other audio/visual aids to make your point.

As you begin:

- Let participants know what to expect. Tell participants the learning objectives and review the agenda at the beginning of the training.
- Be sure participants know why the information is worthwhile for them to know. Use examples from their experience to demonstrate how they can use the information.

During each topic:

- Do not speak for more than twenty minutes without a break for questions or a participatory exercise.
- Give small amounts of information at a time.
- Allow time for participants to think through the information.
- Give participants a chance to give feedback.

Finishing a topic and moving on to the next topic:

- Check frequently to see if participants understand the material, then move on to the next block of information.
- Summarize topics before moving on.
- Make transition statements that bridge one topic to the next.

Training Methods for Active Learning

When designing training, use at least one active method for each passive (lecture, video) method used. Here are some active training methods that can be used for different purposes in a training plan. Each activity is described in the following pages.

Purpose: Energizing and team-building

Games

Icebreakers

Purpose: Working in a group to draw meaning and solve problems

Small group discussions

Fish bowls

Case studies

Purpose: Working at their own pace

Reflections or introspection

Self-directed opportunities

Purpose: Making sure everyone is heard

Debate it

Brainstorming

Dialog circle

Ask-it basket

Purpose: Checking for understanding and transitioning to the next topic

Surveys

Making assumptions

Topic lead-ins

Purpose: Applying what's been learned

Hands-on-please-touch

Let's see it

Purpose: Preparing to do it themselves

Simulations

Role plays

Visualization

Descriptions of Training Methods for Active Learning

Purpose: Energizing and team-building

Icebreakers

Icebreakers help participants become familiar with each other and create an environment conducive to learning. You may have participants seated in the same area introduce themselves to each other and their expectations for the workshop. Have one person in the group summarize who is in the group and summarize expectations they have in common.

Games

Games help relax a training environment. Many games can be adapted to training content. Consider adapting bingo, telephone, pictionary and charades. Games give participants the opportunity to relax, move around and "mull over" training information. Games allow participants to try new processes, evaluate communication and use team-building strategies.

Purpose: Working in a group to draw meaning and solve problems

Small group discussions

Talking helps adults relate topics to their existing knowledge and experiences. Break into small groups to allow several participants to talk about the subject at once. Ask participants to identify one person to facilitate the discussion. Ask another to report on the small group discussion. Provide specific questions to help the discussion stay focused.

Fish bowls

Have several experts (outside experts or participants in the training) sit together. They discuss an issue while everyone else watches. Audience members hear different perspectives, identify controversy and see how an idea fits with their own values.

Case studies

Case studies allow participants to problem solve together. Encourage the group to pay attention to their group dynamics. Who is doing the most talking? How are decisions made? Is it an inclusive process? Participants may learn more from *how* they resolve a case than from the case itself.

Purpose: Working at their own pace**Quick writes**

Give participants questions about the material and its application. Allow time for them to write answers independently. Invite them to share their answers in a small group (or with the larger group). The final question may move to the next section of material.

Self-directed opportunities

Some participants might want advanced content. Participants with more experience might have a special session. They might lend their expertise to the group. It might be useful to have readings and questions that experienced participants can summarize for the other participants in the workshop.

Purpose: Making sure everyone is heard**Debates**

Invite a debate to allow participants to become more familiar with a subject. People with diverse viewpoints can identify points in common and places where their opinions differ. Debates also help participants identify counter arguments they can use against opponents.

Brainstorming

Write the topic for the brainstorming at the top of the easel paper. Everyone should be able to see it. Encourage participants to contribute ideas. Take turns so each person has an equal opportunity to contribute by going around the group repeatedly, person by person, until everyone passes. This makes sure you get all the ideas; be sure to write each idea on the paper. Use the words of the person giving the idea. No idea is criticized or praised. After brainstorming, check the list to make sure everyone understands each idea. Eliminate duplicates only if they are identical. Sometimes differences in wording are important.

Dialog circle

Some participants dominate discussions. Use a dialog circle to give all participants the opportunity to speak. Dialog circles grew out of Native American traditions, where a feather specifies the person who is speaking. A person speaks and passes the feather to the next person.

Ask it basket

An Ask-It-Basket allows anonymous questions or comments. Provide small pieces of paper and a basket or hat for the papers. Invite participants to write questions down on the papers. Read them and invite responses. (A facilitator might read and organize the questions to insure all are addressed.)

Purpose: Checking for understanding and transitioning to the next topic**Surveys**

Use a verbal survey of questions about a topic to measure the group's understanding. If the group answers the questions, reinforce that they know the material. If they miss a question, provide the answer before moving to the next topic.

Making assumptions

Ask participants to make assumptions about the political, technological economic and socio-demographic environment. Ask them to consider the implications of each assumption for their organization.

Topic Lead-ins

Topic lead-ins help move from one topic to another. They generate interest in a topic and activate participants' prior knowledge of the subject. Topic lead-ins encourage sharing of experience, learning needs, resources and expectations. Open-ended questions are a good way to lead into a topic. For example, ask the group what the health concerns of their community are as a lead-in to a discussion about how to do a community health assessment.

Purpose: Applying learning**Hands-on-please touch**

Use hands-on participation especially when working with technology. Give participants real data to use in training exercises. Hands-on approaches reduce barriers to understanding something that is unfamiliar to the participant.

Let's see it

Encourage participants to make graphs, charts or pictures. This allows participants to be creative. They can see the material and integrate it into their existing knowledge.

Purpose: Getting ready to do it themselves**Simulations**

Use simulations. Participants can apply concepts in "real life" situations. Participants use the data provided in the simulation and analyze the situation. They apply new skills and attitudes to "work through" how to put the concept into operation.

Role plays

Role-plays can demonstrate a particular concept. Have all participants do role-playing at the same time. After the role-play, review the situation and identify strengths and weaknesses in each demonstration.

Visualization

Invite participants to picture themselves as trainers. "What are you doing? How does it feel? What do you wish you had? Who are you with?"

Using Training Methods for Active Learning

Review and Discussion

Read: Trainer's Guide pages 31-35, Training methods for active learning.

Review: Participatory training works best with adult learners. Participatory training is *active learning*. Participants discuss and apply new knowledge and skills. Participation fosters learning. Participants move through the four phases of adult learning. Each phase occurs at least once per module or once in a four-hour session.

Participatory training uses principles of adult learning. It enhances learning. Participants learn and remember what they "see, hear, say and do."

Adults have diverse learning needs. Effective trainers use methods that facilitate learning. They create comfortable, organized and convenient learning environments.

ACTIVITY #3: APPLYING TRAINING METHODS FOR ACTIVE LEARNING

Recall your experiences with training and workshops.

- Did any of these trainings or workshops include active learning?
- Have these trainings or workshops included any of the training methods for active learning listed above?
- Which methods were most helpful?
- Which methods were not as helpful?

Develop a hypothetical workshop using training methods for active learning

Work with a small group to plan a hypothetical workshop on home improvement that includes training methods for active learning. Just think about how you might organize different activities into a workshop.

- Assume that you will be able to cover three topics (you can use any three topics on the subject of home improvement).
- Assume that lectures will last for no longer than 20 minutes without a break for an active learning activity.

- You can use any activity more than once (such as topic lead-ins) and can use methods back-to-back (e.g., with no break for lecture, etc.).
- Include lunch and breaks if appropriate.

Consider the following questions as you plan your hypothetical workshop:

- How would you start the day? What would you do after lunch? Before the end of the day?
- What range of activities would you want to include? Why?
- How many activities do you want to include? Why?
- Are there some "core" activities that make sense to use several times during the day, such as when transitioning from topic to topic?
- What types or mix of activities might make sense if your audience has different skill levels?

4. Developing the Workshop Training Plan

Once you know who you plan to train and have reviewed the curriculum, you are ready to complete a Workshop Training Plan. The plan is an important tool and includes:

- Detailed directions for all training activities
- The allotted time for each activity
- The training materials for each section
- Instructions for applying training methods

You want your plan to be focused and detailed. With more experience, you may expand the scope of your training. Make your first training manageable, with goals and objectives that are realistic and achievable.

Basics of a Good Training Plan

- **Use the Four Phases of Adult Learning as an overall guide.** Over the course of the training, move participants through the Four Phases of Adult Learning - Experiencing, Processing, Generalizing, Applying - every four hours.
- **Plan for your audience.** Are participants from diverse backgrounds? Do they know each other? Are there any visual, movement or hearing abilities to consider? Make sure to plan and modify activities accordingly.
- **Focus on information, knowledge and skills that participants need to know.** What do the participants expect from the training? What do they already know? What do the participants need to accomplish their goals? Use your knowledge of their learning needs and the topic to design the training.
- **Write down specific learning objectives that you want your participants to achieve.** What *specifically* do you want the participants to know and be able to do? Are there particular skills, knowledge and attitudes you want them to demonstrate?
- **Match objectives to training methods.** If you want participants to be able to do something on their own, after the workshop, make sure to give them time to practice that skill during the workshop with your support and peer support.

- ❑ **Create a balanced training plan.** Some people learn best by listening, others by seeing, and others by doing. Include a variety of active learning methods used for different purposes. Include activities that allow all participants, not just those that are more talkative, to contribute their thinking.
- ❑ **Make it flow.** Think about the "flow" of the day to make sure that participants have the opportunity to get to know one another, re-energize at various points in the day, and work in groups and independently.
- ❑ **Include transitions.** Introduce topics in a way that prepares participants to take in new information, based on what they already know and have learned.
- ❑ **Include check-ins and summaries.** Include opportunities to "check-in" from time to time to make sure that all participants understand the material. Summarize what has been covered periodically.
- ❑ **Include rest and food breaks** - and make sure to stay on track so you can actually give participants a break!
- ❑ **Prepare back up exercises.** The group might have different expectations or the group size might be different. Do not go back to the "lecture ... questions ... lecture" format.

Training with Data and Technology

Are you using data from published reports? Are you using data obtained online through the Internet? Be sure to include time in the plan for participants to become familiar with these tools.

The trainer needs extra time to clearly identify

- The reports
- Types of data
- Steps to obtain data online.

Participants need extra time to

- Recognize the elements of reports
- Navigate an online system
- Locate the data they need.

Before the workshop, ask training participants about their experience with data or the Internet. Determine how much time you need to allow. Add at least an additional half-hour for those who have limited exposure to data or technology.

This is very important. You will need computer equipment and an Internet connection for participants to have hands-on experience.

Evaluating the Workshop

Feedback from participants is valuable. An example of a training evaluation form is included in the Trainer's Guide Toolkit.

Ask participants to give feedback. Use a scale from 1- Excellent to 5- Poor. Rate the overall quality of the workshop. Rate their change in understanding, knowledge, and skills. Allow space for comments. What was especially helpful? What would work better? What other topics are you interested in?

Read completed evaluations. Review them for themes. What is common among trainees? What worked? What did not work? Summarize the results. Use the feedback to plan your next workshop.

Developing the Workshop Training Plan Review and Discussion

Read: Trainer's Guide pages 29-37 - The four phases of adult learning, Tips for active learning, Training methods for active learning, and Basics of a good training plan.

Review: "Basics of a Good Training Plan" discusses a list of factors that shapes the content, activities, materials and media you might use. The curriculum includes activities and worksheets you can use for your workshop. How you use these tools is determined by your training plan.

Your plan is a road map to follow. It helps you stay focused. To develop the training plan, think about the participants you plan to train. Determine the scope of your training workshop.

Discussion: When you know the characteristics of the participants and the curriculum content, you can complete a Workshop Training Plan. The plan is an important tool and it includes:

- Detailed directions for all training activities
- The allotted time for each activity
- The training materials for each section
- Instructions for applying training methods

ACTIVITY #4: DEVELOPING THE WORKSHOP TRAINING PLAN

- Work with your group to develop a sample training plan for a half-day session on one step in the curriculum.
- Break the step up into the number of topics you think it is possible to cover in a half a day (probably no more than 2 to 3).
- Pick 2 active training methods out of the hat. Use AT LEAST ONE for your plan.
- You should also include ADDITIONAL active learning methods of your choice, either from the list of Training Methods for Active Learning (pages 31-35) or from your own experience.
- Use the Activity #4: Workshop Training Plan Worksheet at the end of this section to develop your plan.
- As a group, write goals and objectives identified in Activity #2.

- Your group will present a portion of your plan to the rest of the participants on Day 3. Think about how you might role-play an activity with the larger group.

The plan should include:

- Directions from the trainer to participants to set up each activity.
- Any prompts or questions that participants will answer together or by themselves, as part of the activities (e.g., the questions you want participants to discuss in Small Group Discussion, the questions you will pose to your participants as part of a Topic Lead-In).
- The allotted time and materials needed for each activity.

Review the Sample Training Plan that follows. What are the pieces of the plan? How do they help you? How might you use the plan? What pieces might work with those you plan to train? Which might not? What would you change for your participants?

Activity #4 Debrief

- Discuss with your small group how your training plan moves participants through the Four Phases of Adult Learning (page 29).
- Which phases do you feel your plan covers well?
- What is still confusing about using these phases as a guide for your plan?
- Present your group's thoughts to the larger group.

Activity #4 Worksheet: Workshop Training Plan

Make multiple copies of this worksheet. Record curriculum review notes. Complete a training plan for your planned workshop.

Activity #4: Workshop Training Plan Worksheet

Use this worksheet to develop the training plan for your workshop. Make multiple copies to cover entire plan.

Goal: _____

Learning Objective: _____

Time and materials	Task	Trainer Instructions/Methods

Here's a sample training plan:

Goal: To teach participants to understand, apply and present health research data.

Learning Objective: Participants will be able to determine appropriate uses and limitations of data.

Time and materials	Task	Trainer Instructions/Methods
50 minutes <ul style="list-style-type: none"> • Criteria for Evaluating Data • Commander Data Jeopardy game 	<ul style="list-style-type: none"> • Group review of criteria • Apply criteria to evaluate examples of data in the Commander Data Jeopardy game 	<ul style="list-style-type: none"> • Prepare for this section by setting up the Commander Data Jeopardy game. Make flash cards using 3x5 inch index cards. To make flash card: Write the data name on one side and score points on the other. Tape flash cards onto easel paper with the data name displayed. As they play, participants correctly identify the data name matching the definition given. On the correct answer, turn over flash card to see the number of points scored for the correct answer. • Review list of criteria for evaluating data • Inform participants that they will apply the criteria to data examples used in the data game. • Divide participants into two groups to compete for top score. • Tell the participants they will play the Captain Data Jeopardy game for points. Write two columns on a blank chart paper and write Team A on one column and Team B on the other. Assign the groups to A or B to compete as a group by raising their hand to answer. Select the first person who raises a hand. • Read definition of one of the data types and ask participants to identify the correct data type from the choices on the easel paper. Give the correct answer and score. Add up the score and applaud the winning team.

5. Conducting the Community Workshop

Before the workshop

- Test all audio-visual equipment and videos
- Check written materials, making sure you have everything you need
- Make sure the room is set up with tables and chairs. Can participants work on learning activities in small groups?
- Hang blank easel paper to use for recording expectations
- Hang directional signs to help people find the location

Organize workshop materials:

- Sign-in sheet
- Agenda for participants
- Training materials or handouts
- Chart paper and markers
- Evaluation forms

Getting started

Welcome participants. Ask them to sign-in. Give them their learning materials and nametags. Start on time. Start with a round of self-introductions where participants give their names, the organizations they represent, and their expectations for the workshop. Write their expectations on the easel paper. You'll use this information to identify those expectations that will be met by the workshop and those that will not. This gives you an opportunity to assess actual participants and their learning needs.

Establish an agreement of what to expect

Participants need to know what to expect and what is expected of them. Review their list of expectations. Identify those items that the workshop will cover and what is expected of participants.

- ✓ State goals and objectives for the training
- ✓ Review the agenda
- ✓ Acknowledge participants' experience and knowledge
- ✓ Identify amenities, such as the bathrooms, phones, food and drinks

Establish ground rules

- ✓ Honor everyone's input
- ✓ Value each person's opinions
- ✓ Agree to disagree
- ✓ Speak one at a time
- ✓ Start and end on time

Training with data and technology

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Facilitate the training experience

- **Use open ended questions**
Stimulate discussions. Ask open-ended questions—where, when, what, how and why--that check for knowledge and understanding. "How would you apply this

technique?" "What new information have you learned during the group activity?"
"What information may be used against your position?"

- **Be an active listener**

To listen actively:

- Check for understanding of what is said by rephrasing participants' words
- Ask for clarification
- Connect participants' points to the topic
- Maintain open body language
- Make eye contact with speakers
- Acknowledge understanding

- **Check for understanding**

Ask participants if they understand the topic. Ask if they understand instructions for learning activities. Make adjustments if participants misunderstand the material. Offer help with concepts or skills.

Manage the time

Trainers engage participants and facilitate their understanding of a topic in a limited time. You control the time. Identify when breaks are to begin and end. Control discussions by tabling discussions that are off-topic. Write them on the chart paper. Indicate another time to address them.

Closing Activities

Ask participants to summarize what they found useful. Review expectations stated at the beginning. Check that items were covered as expected. Summarize key points learned during the workshop.

6. Follow-up Strategies

When adults immediately apply information (ideally with feedback), they are more likely to remember what they have learned. Help participants identify at least one way to apply the materials and skills from the workshop. Encourage follow-up among participants after the workshop. Provide participants with written materials they can use when they leave the training session. Be sure that participants understand these materials and how to use them.

After the training, evaluate the effectiveness of the training in meeting its goals. Find out if participants were able to use the training materials in their situations.

7. TRAINER'S TOOLKIT

References and Resources on Adult Learning

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<http://adulted.about.com>

American Association for Adult and Continuing Education (AAACE)
<http://www.aace.org/>

American Society For Training and Development
<http://www.astd.org/>

Community Partnerships for Adult Learning
<http://www.c-pal.net/>

Educational Resources Information Center (ERIC): Adult, Career and Vocational Education
<http://www.ericacve.org/index.asp>

National Adult Education Professional Development Consortium
<http://www.naepdc.org>

National Center for the Study of Adult Learning and Literacy
<http://gseweb.harvard.edu/~ncsall/>

Outreach and Technical Assistance Network
<http://www.otan.us/>

Books and Articles

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