Training *for Trainers*

A Guide to Designing Interactive Trainings Using Popular Education Techniques

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About Joan Minieri

Joan Minieri is the co-author of the award-winning book *Tools for Radical Democracy: How to Organize for Power in Your Community* (Jossey Bass 2007). She co-founded Community Voices Heard (CVH), for which she received a Leadership for a Changing World award from the Ford Foundation. Joan was the founding co-director of the New York City Organizing Support Center, where she trained community organizers and grassroots leaders in organizing techniques and helped them develop new training skills. In addition to designing and facilitating training sessions with the RCLA Social Change Leadership Network, Joan collaborated in several RCLA social change initiatives and co-authored several RCLA publications for practitioners, including *From Constituents to Stakeholders: Community-Based Approaches to Building Organizational Ownership and Providing Opportunities to Lead*; *Transforming Lives, Changing Communities: How Social Justice Organizations Build and Use Power*; and *"It's Hands-On..." Cultivating Mentors and Emerging Social Justice Leaders through Shared Project Development*. Joan holds an MS from Columbia University and is on the adjunct faculty of NYU Wagner and the Columbia University School of Social Work.

Using This Handbook

This handbook provides an overview of information and tools you can use to design or enhance interactive training programs in your organization. We present the material in a "training for trainers" format, outlining the same activities we include in RCLA's "training for trainers" learning sessions.

While we hope this booklet proves useful to trainers at every level, we intend it primarily for those who hold multiple responsibilities in their organizations and want to improve their training skills. These individuals include program staff, directors, community leaders and others who provide group training but have limited opportunities to focus on and develop the specific competencies necessary to train others effectively.

PART One:

Fundamental Concepts. We introduce some basic concepts of Popular Education and focus on creating an interactive approach to training. We also review various ways in which adults learn. This is not an attempt to provide an all-inclusive primer on adult education and Popular Education. However, we do offer a brief resource list of important texts at the end of this publication for those who would like to explore further these fields of study and practice.

PART Two:

Emphasis on Design. There are two general categories of responsibility for a trainer: 1) *designing* the training and 2) *facilitating* the training. Our emphasis here is on the process of design. The skills you need as a facilitator relate directly to how you have organized your training session. For example, if your design calls for you to present information and then facilitate a discussion among participants, the skills you will need are very different from those you might use to help participants absorb information through hands-on learning.

One core concept we explore is the idea of breaking away from an all-too-common habit—presentation-style training. As an alternative, we describe how to create engaging ways for participants to make new information their own during training so they can apply it in whatever ways they need to afterward.

PART Three:

Implementing the Design. We include some basic information about facilitator and trainer skills, as well as sample activities that demonstrate interactive design and a participant-centered facilitation style. We explore body language and working with silence and include an example design of a 40-minute session. The approach to training that we describe requires no special technology. If you have access to chart paper, markers, tape, Post-its and index cards, you are ready to go!

> *Education must begin with the solution of the teacher-student contradiction, by reconciling the poles of the contradiction so that both are simultaneously teachers and students.*
>
> —*Paulo Freire*

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Part One
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Popular Education: Some Fundamental Concepts

Popular Education is an alternative approach to learning through dialogue that arises from the social and political context of the student's life. The following summarizes some of the fundamental concepts of Popular Education, framed so that trainers can directly apply them to designing their own effective training sessions.

Engage Participants Based on Their Own Experiences

People are more likely to remember and use information when they can find meaning in it that relates to them personally. Helping participants engage actively with the content of their training—rather than expecting them to absorb it passively from a presentation—allows them to relate the information to their life experiences and make it their own. When training makes a connection with the experiences of participants, they are more likely to enjoy the process and use what they learn more effectively.

This is one core way in which Popular Education training empowers people. The trainer is not an expert on participants' experiences—they are their own experts. Paulo Freire, author of *Pedagogy of the Oppressed* and other important works on Popular Education, describes this as people becoming the subjects of their own learning (*you decide what it means to you*), and not the objects (*I decide what it means to you*).

Work toward Goals and Objectives

In order to design a training to meet clear goals and objectives, you can start by asking, "What do the participants need to learn?" rather than, "What do I need to teach?" Every answer that arises will become an objective in your design. The next step is to design activities that allow participants to demonstrate their learning as it occurs so that you will know they are meeting the objectives you have discovered with them.

Using action verbs when you write the design (which we show in bold type throughout this handbook) is one tool to help you create more active training.

On the next page is an example of how you can develop an interactive activity in which participants work toward an objective, relating something they need to learn to their own experiences and demonstrating what they are learning about it.

> [Dialogue...] "requires an intense faith in humankind, faith in their power to make and remake, to create and recreate, faith in their vocation to be more fully human (which is not the privilege of an elite, but the birthright of all)."
>
> —Paulo Freire

ACTIVELY EXPLORING FUNDAMENTAL CONCEPTS

Objective

By the end of this activity, participants will have: **compared** fundamental concepts to their own experiences.

Activity

Task One: See an example of a sun chart.

Trainer draws a simple circle in the middle of a piece of chart paper, with five or six lines coming out of it—essentially a stick-figure sun. The image fills most of the space on the chart, so participants can see it from far away. This is an example of a 'visual organizer'—a tool for engaging people who learn best by looking at images. For more on learning styles, see page 10.

Task Two: With a partner, **recall** workshops, trainings or classes where you, as participants, were excited and actually learned.

Task Three: Together, **create** a sun chart listing the factors of your positive learning experiences and how these made your experiences so good.

Trainer provides an example, writing a phrase inside the 'sun' circle such as, "We learn when…" The trainer then writes on one of the 'rays' coming out of the circle, "The room is comfortable," and says, "I feel much more open when I have space to walk around, there's plenty of light and it's not too cold or hot."

Task Four: Post your sun chart on the wall, and we will hear from some pairs about their experiences.

Task Five: Read the list of Fundamental Concepts for Popular Education and Setting the Learning Environment. **Circle** what is most resonant for you.

Trainer provides these materials, prepared in advance, based on the concepts on pages 3–9.

Task Six: Examine your sun charts and all the others in terms of the Fundamental Concepts and Setting the Learning Environment. How are these concepts present on the sun charts? What could we add?

Materials

- Chart paper (enough for one sheet per two participants)
- Markers for each participant
- Tape
- Handouts of Basic Concepts and Setting the Learning Environment for each participant

We learn when...

The room is comfortable.

Influence Knowledge, Skills and Attitudes

In most training sessions you try to influence participants' knowledge, skills and attitudes. Knowledge is information, usually an overview of a concept or background about the topic. Skills are the abilities people need to perform tasks. Attitudes are feelings and beliefs. While it is harder to immediately evaluate the impact of training on someone's attitudes, training and experience together can shift a person's attitudes over time.

Design the Training in Advance

It takes time to design a good training. Attempting to train on-your-feet with minimal or no preparation usually leads to frustration. It takes time to consider what the participants need to know, create action-oriented objectives, and pay attention to the flow of ideas and concepts. Just going through your design and figuring out how much time it will realistically take to do each of the activities takes time!

> ## Practice Tip: Three Hours of Prep for One Hour of Training
>
> Each hour of training time requires at least three hours of preparation. If you don't know much about the topic or if it is particularly complex, the prep could take even longer.

Set a Positive, Conducive Learning Environment Physically and Emotionally

It is important to hold trainings in appropriate spaces, with attention to light, temperature and acoustics. A training site where people can sit and move comfortably and see and hear clearly brings the best results. Learning improves when people can see each other's faces—circles and parallel tables are better than rows. Having some simple food and beverages available helps to create a welcoming environment and keeps people energized—nothing heavy or too sweet! Even if you hold the training in the middle of a crowded office, take time to clear the tables, arrange chairs and turn off phones. Consider renting or borrowing appropriate space when necessary.

A positive emotional environment in which people can feel safe and respected is also essential. When new information competes with fearful emotions for the brain's attention, the emotions usually win. People tend to bring whatever unpleasant experiences they associate with school when they come to a training session. For some, this includes a fear of being called on to answer questions, needing to respond to what they think the teacher wants, or being judged for their participation. It is important to intentionally demonstrate that the training environment is a space where they can talk freely, exchange ideas and just listen when they so choose. A key aspect of respect and safety is to talk about what is close enough to be relevant with enough distance and discretion to be safe.

It is common to agree upon ground rules at the start of the training. However, you can also build safety and respect directly into the training design by setting up a range of activities that allow participants to choose whether or not they actually speak. You can also invite them to speak in both small and large groups, welcome questions from participants, wait for them to respond to your questions, and truly listen and affirm the responses you hear. All of these design features, which you implement with interactive facilitation techniques, foster communication and establish respect and safety.

Make Good Use of Prime Time: Warm-up and Close-out

The beginning and the end of the training are prime learning times—people will remember what came first and what came last. Rather than viewing the opening minutes of the training as a time to "break the ice," you can think of it as the time to "warm up" participants to the content to come.

You can do this by starting with a go-around, hearing everyone's names and what brought them to the training. This simple process is your first opportunity to "raise all voices," as we further describe on page 9. The objectives are to bring everyone into the training space and clarify how the training will or will not address their expectations.

You can then start with a warm-up activity, even if it is very brief, to link participants with the topic of the training. Once the participants are warmed up, you can ask each participant to say what she or he expects to get from the training, then review what it will cover so participants get a sense of how it may or may not address their expectations.

The following is an example of an effective warm-up.

Training Activity:

WARMING UP TO THE TOPIC

Objective

By the end of this activity, participants will have: **explored** their thoughts about the topic using a visual tool.

Activity

Task One: Look at the photographs spread out on the table and choose one that best captures what you are thinking about the training topic.

Trainer has printed up photographs on 8-1/2 by 11 inch paper, providing a range of images that invite interpretation, not just images that concretely convey the topic. (See Appendix Two for information about the Center for Creative Leadership's Visual Explorer tool as one source for images.)

Task Two: Find a partner and talk about what you have each selected.

Task Three: Together, we'll hear from the pairs about what you are thinking about today's topic.

As an alternative to photographs, you can gather and lay out an array of objects borrowed from nature, such as shells and leaves, and/or an assortment of small toys and knick-knacks purchased at a discount store. For an example of a different type of warm-up, a Bingo Game you can adapt to any topic, please see page 36.

Materials

Photographs or objects for each participant

At the end of the session, clearly close the training with a go-around, as well as a summary and clarification of next steps. An effective closing offers an opportunity to look back on what was covered in the training and bridge forward to the next day's activities or the participants' work outside of the training. It can serve to tie things together, motivate and celebrate. The following is an example of an effective close-out activity.

Training Activity:

CLOSING OUT THE TRAINING EFFECTIVELY

Objective
By the end of this activity, participants will have: **reviewed** their learning using a simple closing.

Activity
Task One: Looking at the shapes on our charts, **write** down something you saw, heard or did today that:

- "Squared" with what you already knew or believed

- "Completed the circle" of your understanding

- Gave you a "new angle" on something

- Leaves you most curious!

Write at least one response per shape.

Trainer places the following four simple charts across a long wall so participants can easily see them all: 1) large outline of a square 2) a circle 3) a triangle 4) a question mark. Each participant has a marker as well as either index cards and tape or a pad of Post-its large enough to see from a distance.

Task Two: Post your responses on our charts.

Task Three: Together, we'll **review** our learning.

Materials
- Four simple charts
- Markers for each participant
- Index cards and tape or Post-its

Use a Variety of Methods

Most people remember a small portion of what they only hear or see. The following provides an example of how this generally plays out in a training. The topic is how to set up an effective team in your organization:

- **Trainer:** Talks about tips for team building *or* posts a chart with team-building tips for the participants to see.

- **Participants Recall:** It was about team building.

If the participants see *and* hear something, they remember more.

- **Trainer:** Posts *and* describes the information on the chart *and* asks the participants to talk about it in a small group.

- **Participants Recall:** It was about what makes a team work.

The vast majority of what people learn comes from what they actually do.

- **Trainer:** Posts a chart *and* talks about it *and* asks participants to talk about it in a group and set up their own effective team using the tips described.

- **Participants Recall:** How to set up an effective team.

In addition, people learn in different ways. When you include a variety of different methods in the training, each participant can find something to connect with. For more information about learning styles, please see page 10.

In a Popular Education approach, the trainer does not give a presentation for people to listen to and discuss. In that type of presentation-style training, only those participants who learn by listening or talking have any chance of getting something out of the experience. Even they are unlikely to truly make the material their own until they actively do something with it.

As we describe on page 10, methods such as having participants draw, write, sculpt and work in pairs and small groups are all effective ways of connecting with a range of learning styles. Adding these hands-on activities to what you say in the training, what participants talk about and the visual elements you provide all increase the potential for real learning to take root.

Observe Participants as They Practice New Skills

A series of tasks, like those we outline above in the team-building example, also gives the trainer a chance to evaluate the learning. The best way to know if participants grasp the content of their training is to watch them practice it. In addition to a role-playing activity such as, *"Now use*

The most important thing is your audience, not only the issue or topic you are covering.

—RCLA *Training For Trainers participant*

the team-building tips to form your own team," the trainer can observe participants doing things such as telling someone else what they learned, making a list or drawing a chart before they leave the training.

Raise All Voices

People learn more when they voice their thought processes, questions, ideas and insights. In a Popular Education approach, you hear the voices of both trainers and participants throughout the training.

At the same time, it is important to create some space in the training for thinking and reflecting—don't fill up every second with talking and activity. For example, the trainer may say, "How about hearing from someone who hasn't had a chance to say anything yet?" then wait silently, even if it takes a few minutes for someone to respond. This facilitator skill also demonstrates respect and safety, showing that you will wait for those who may need some time to collect their thoughts. For more on Facilitator Skills, see page 25.

Reinforce the Learning

Periodically, you can summarize what has happened so far and remind participants about what is coming up. This helps reinforce learning and keeps people energized by the flow of the training.

Have Fun!

Incorporate activities that are fun, make people laugh and provide opportunities for participants to get to know one another. In addition to creating a space in which people want to be present, it fosters the environment needed for learning. When the mind and body are relaxed and open, learning is truly possible.

Practice Tip: Know Your Own Style

Trainers often train to the style in which they like to learn. For example, a verbal learner might design mostly discussion-oriented activities and not include enough charts or practice tasks to engage a fuller range of learners. If you are aware of your own comfort zone, it can be easier to spot the ways in which you need to expand your training techniques.

Learning Styles: How Do People Learn?

People generally process information and learn through what they see, what they hear and what they do. Each training participant has a particular way or combination of ways of learning that reflects a preference based on these three main styles, which are known as: visual (seeing), auditory (hearing) and kinesthetic (doing).

Harold Gardner's research on developmental psychology and neuropsychology led to the theory of what he calls "multiple intelligences," which has useful applications for expanding the idea of how adults learn in a training session. The following is based on a variation of Gardner's theory:

Learning Style	Characteristics of the Learner
VERBAL	Comfortable with words. Needs to say it, hear it or write it. Wants to talk about it in pairs or groups, read or write it.
VISUAL	Relies on sense of sight and ability to visualize. Wants to draw it, visualize it.
MATHEMATICAL	Understands through a linear flow of ideas. Likes numbers. Wants to quantify it, think critically about it, plot it on a chart.
PHYSICAL	Likes physical movement and listening to her or his body. Wants to dance it, build a model of it, tear it apart.
MUSICAL	Recognizes tonal patterns, sounds, rhythms, beats. Wants to sing it, chant it, rap it, learn it to background music.
REFLECTIVE	Aware of own internal states of being. Wants to relate it to a personal feeling.
INTERPERSONAL	Able to "read the room" and learns from diving in with others. Wants to work on it actively in a pair or group.
NATURALISTIC	Inspired by the natural world. Uses nature as a point of reference. Wants to plant it; dig it up; compare it to a mountain, storm or stream.

As we reviewed under Use a Variety of Methods on page 8, you can build a range of activities into the design so that all different types of learners can connect with the content of the training.

The following is an example of how you can further explore learning styles.

EIGHT WAYS TO LEARN

Objectives
By the end of this activity, participants will have: **identified** their own ways of learning and **heard** about other people's ways of learning.

Activity
Task One: Review the photographs on our table, keeping in mind the eight ways to learn and the three basic concepts of seeing (visual), hearing (auditory) and doing (kinesthetic). Choose an image that describes your own way of learning.

Trainer has pre-printed photographs displayed on a table. As an alternative to photographs, you can gather and lay out an array of objects borrowed from nature, such as shells and leaves, and/or an assortment of small toys and knick-knacks purchased at a discount store.

Task Two: Look at the signs posted around the room, and **go** to the sign that best describes your learning style.

Trainer has put up eight signs in different areas of the room, with each of the eight ways of learning, including brief descriptions.

Task Three: Talk with the others under the same sign about the photo you chose and why you consider that way of knowing the one that best describes your style.

Task Four: Together, we will **hear** a sample of what you talked about.

Task Five: Take another photo from the table that indicates a learning style you would like to strengthen in yourself.

Task Six: Then **go** to one of the signs of the eight ways of knowing that indicates that style, and again, discuss with the others who chose that style.

Task Seven: Together, we will **hear** a sample of what you talked about.

Materials
- Eight signs with each of the eight ways of learning listed and briefly described
- Photographs or objects

Creating a Buzz: Raising All Voices through Partner Interactions

The following are some ways to use verbal activities that get participants working with one another. These techniques are energizing and create a buzz. They get a lot of different people talking to at least one other person—with many people talking at the same time. You can generally adapt the following for use in pairs or small groups.

Interviews

Give participants specific questions to ask a partner or provide the framework for them to form their own questions. Write the questions/framework on a handout or chart. Always have them reverse the interview, so each person gets the chance to talk. Interviews can lead to more thorough dialogue later.

- Ask your partner to list what she or he thinks of as three effective leadership practices.

- Ask your partner two questions about how effective leadership happens in groups.

Sentence Completion

Write partial sentences and give them to the participants. They will complete the sentences, then share their results with a partner or small group.

- An effective leadership team always…

- An effective leadership team never…

Think/Talk/Share

Participants think about something and then talk about their thoughts with a partner or small group. They then share some aspect of their talk with the large group.

- Think about the most effective leader you've ever met. Discuss with others about what made this person stand out for you.

Teach and Reverse

Participants select a concept they believe they can explain to someone else. Explain, and then reverse the process.

- Explain to your partner why leadership is a collective achievement.

> *Understanding is far more likely to be achieved if the student encounters the material in a variety of guises and contexts. And the best way to bring this about is to draw on all of the intelligences that are relevant to that topic in as many legitimate ways as possible.*
>
> *—Harold Gardner*

The following is a brief activity for designing partner interactions.

Training Activity:

DESIGNING PARTNER INTERACTIONS

Objective

By the end of this activity, participants will have: **developed** partner interactions they can use in their own training.

Activity

Task One: **Think** of a training you need to design.

Task Two: We'll go around and **hear** one word from each trainer about the topic for which she or he needs to design a training.

Task Three: On your own, **design** a partner interaction that you could use in a training.

Task Four: In small groups, we'll **review** your designs.

Materials

Paper and pens for each participant

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Part Two
Design Format: Six Steps for Training Design

In this section we describe the specific steps you can follow to design effective training sessions based on the concepts we explored in Part One.

The six steps are as follows:

1 Conduct an Assessment

2 Establish a Goal

3 Name the Parts

4 Write Objectives

5 Design Activities

6 Put It All Together

Step One: Conduct an Assessment

Knowledge, Skills, Attitudes

A needs assessment helps you identify the most effective content for your training. It can reveal what knowledge people need, skills they want to develop and attitudes they wish to examine.

- Knowledge is information.

- Skills are the abilities needed to perform tasks.

- Attitudes are feelings and beliefs that influence actions.

In most trainings, you try to influence all three.

Ask, Study, Observe

The combination of three information gathering strategies—Ask, Study and Observe— provides the most information for assessment.

Ask. Develop a series of open questions (questions that do not require a 'yes' or 'no' answer— see the sample assessment worksheet on the next page for more on asking open questions). The questions will clarify the experiences people bring to the training, specific problems or needs they have related to the topic and how they will apply the knowledge and skills. Identify at least three to five potential trainees who can answer these questions. Schedule a phone or face-to-face appointment so that you can ask your questions and listen carefully to the answers.

Study. Read about the topic through reports, articles and books. Attend workshops or trainings. View documentaries or training videos. Recall your past experiences related to the topic and any insights you might have about those experiences.

Observe. If you are training people within your own organization, watch them in action. Pay attention, talk with colleagues about the skills, knowledge and attitudes that potential trainees demonstrate, and the areas where training would build effectiveness. Take notes and be as objective as possible about what you observe. For example, when you see someone interrupting others, you can note: Jackie interrupted Sam four of the five times Sam was speaking. Note the difference between this kind of observation and a more subjective note, which implies a value judgment: Jackie was controlling in the group.

On the next page is a sample worksheet you can use to guide your assessment.

Practice Tip: Assessment Leads to Better Training

Conducting an assessment before designing a training always pays off. If you can speak directly with some participants you will be training, you will learn a great deal that you can use in designing the session. If at all possible, observe the participants in action, doing something that the training will help them to do better. Assessment helps you to design the training based on what the participants need to learn, rather than based on what you need to teach.

Assessment Worksheet

1. **Topic.** What is the topic of your session?

2. **Direct Assessment Questions.** What are at least three open questions you will ask a small number of people who will be participating in the session so that you can assess the knowledge and skill areas that need development and the experiences they will bring to the training? (An 'open' question cannot have a 'yes' or 'no' answer. It allows participants to draw openly from their experiences and invites conversation. Closed questions lead participants to a more narrowly defined, less illuminating conclusion. For example, an open question is as follows: *What is most unclear to you about your responsibilities as a Board member?* The following is an example of a closed question: *Are you clear about what your responsibilities are as a Board member?* For additional sample open questions, see below.)

3. **Training Participants.** Who is coming to the training? Record any important, relevant details. For example, are they new staff? Experienced members of the organization? What is their age range? How many people in total do you expect?

4. **What They Need to Learn.** Why are they coming to the session? What do they want to learn about the topic? (The answer to this question frames the goal of the training.)

5. **Using the Information.** How will they use the information they learn?

6. **What You Know about the Topic.** What are three things you know about the topic from your own experience, study and observations?

7. **Timing.** How much training time, aside from breaks and moving between activities and meals, will you have to work with?

8. **Date and Location.** When will you conduct the session? Where will you hold it, and what do you know about the training environment (or, if you have some choice in the environment, what kind of location will work best, based on your assessment)?

Sample Open Questions

- What was the most valuable part of this for you?
- What surprises you about this new direction?
- What really interests you about this topic?
- What is the best thing that could happen now?
- How has this situation affected you?
- What do you need to know to better understand this?
- How can you remember this?
- What does this remind you of?
- Why does that happen?
- How are these ideas different?
- What would you change?
- How could you improve this situation?
- What are your questions about this?
- How does this topic relate to your work?
- Can you tell me more about…

Step Two: Establish a Goal

Based on the needs assessment, what is the goal of the training? What do the participants need to learn?

The goal reflects the experience and number of participants, what they need to be able to do as a result of the training, and what you can do in the timeframe available.

Effective trainings do not have more than one to three goals. For a sample goal, see Appendix One.

Step Three: Name the Parts

The following is a suggested method for visually breaking the topic into its parts. It is useful to do this with a piece of large chart paper, a marker and either Post-its or index cards and tape.

- Using a dark marker, **divide** a piece of chart paper into four squares.

- Across the top of the chart **write** the goal and a draft title.

- **Assign** a chronological number to each square.

- Using Post-its or index cards and tape, and referring to your needs assessment, **write** down the parts of your topic that you think you can cover in the time you have available, and assign a block of time to each square. For instance, for a 40-minute session, each square on your chart can represent 10 minutes of training time.

- **Keep in mind** that the first and last parts of your training will need to include a warm-up and a close-out activity.

- **Place** the Post-its or index cards in each of the squares of your chart, in the order that seems to make the most sense. This simple method offers you the freedom to step back, look at the parts and their order, and move them around as needed. You can do this both at this step in the design process and as you further develop the training.

When you break down the training, consider what participants need to do in each part of the training in order to be able to move to the next part with confidence and understanding.

For a sample design worksheet, see page 21.

Step Four: Write Objectives

Many people have experience naming objectives for everything from fundraising proposals to strategic plans. Similarly, when you bring participants into a learning experience, what is the objective? You can think of a training objective as something that is observable and based on achievement.

In writing training objectives, you can ask yourself the following question: *By the end of this part of the training, what will learners HAVE DONE with the information that allowed them to make personal meaning of it?*

Thinking of objectives as actions the participants will take moves you away from presenting or discussing the topic and instead allows them to do something. Using action verbs when you write objectives, as we demonstrate in this handbook, is a tool for creating action-oriented objectives and outcomes.

The following describes a method for writing objectives. For sample objectives, see Appendix One.

- Using action verbs, **write** at least one objective for each part of your training. Again, write on Post-its or index cards. Choose a different action verb for each objective. (For sample action verbs to stimulate your thinking, see the list below.)

- Now, **place** each objective in the corresponding square on your chart. For a sample design worksheet, see page 21.

- **Review** the objectives in relationship to the goal. If participants meet the objectives, will they achieve the goal of the training?

Action Verbs

Participants will have…

Added	Argued	Arranged	Bridged
Collected	Conducted	Compared	Demonstrated
Described	Diagrammed	Eliminated	Identified
Interviewed	Performed	Rejected	Reversed
Sung	Sculpted	Sorted	Surveyed
Taste-tested	Toured	Woven	Written

Step Five: Design Activities

Through activities—doing and talking—participants make the information their own and move to deeper levels of learning.

One effective way to reinforce learning is to encourage participants to reflect on what they have done in the training so far. This is known as "looking back." They then link this reflection with something that is coming up, either in the training or in their work with their organization. This is known as "bridging forward." Looking back encourages reflection; bridging forward helps participants transfer their learning from the training session to the world.

Using open questions helps enhance both looking back and bridging forward. The following are some examples of questions for the entire group, or for small groups, that encourage both looking back and bridging forward:

Looking Back	Bridging Forward
What did you learn from that activity that surprised you?	How can you apply this to your work plan?
How did this task build on what we did yesterday?	What will you do differently now in your organization?
How did this activity prepare you for the outreach we'll be doing this afternoon?	What does this tell you about the skills training new staff members need?

The following describes a method for designing activities. (Sometimes trainers refer to these as "exercises.") It is helpful to break down the specific tasks the participants will move through so you can see each part of the activity. This helps you to determine how interactive the activity will be, how much time it will take and how well it meets the guidelines of the Activity Design Check-in.

For sample activities, see the various Training Activities throughout this handbook, as well as Appendix One.

- **Review** the Activity Design Check-In on page 22.

- **Write** some thoughts on Post-its about activities that would help you meet your objectives.

- **Break down** the tasks required to complete each activity.

- **Place** these on your training design chart.

After Completing the First Five Steps…

Your chart should include the following:

- The goal.

- A draft title that indicates the topic.

In addition, each square on the chart should include the following:

- The name of the part.

- Draft activities and tasks.

- At least one objective for each part of the session.

For a sample design worksheet, see the next page.

The following shows how goals and objectives connect with activities in which participants demonstrate their learning.

Goal *The purpose of the training*	Objective *What participants need to learn*	Demonstrate Learning *What participants do to show that they learned*
Connect new people with the organization	Facts about the organization's history	Tell a partner what most surprised you about the history
Prepare members for action	How to engage the press	In small groups, write anecdotes from your own experience with the issues
Leaders conduct recruitment	How to do an outreach script	Say 10 things in 60 seconds about the organization and why you're involved

Sample Design Worksheet

Goal: _____

Topic/Working Title: _____

PART 1: _____

Activities/Tasks:

Objective: By the end of this part
participants will have:

_____
(action verb)

PART 2: _____

Activities/Tasks:

Objective: By the end of this part
participants will have:

_____
(action verb)

PART 3: _____

Activities/Tasks:

Objective: By the end of this part
participants will have:

_____
(action verb)

PART 4: _____

Activities/Tasks:

Objective: By the end of this part
participants will have:

_____
(action verb)

Activity Design Check-in

Learning Styles. How do the combined activities engage various learning styles? For more on Learning Styles, see page 10.

Keeping up the Energy. How do you keep up the energy throughout the training? For more on Keeping up the Energy, see page 25.

Partner Interactions. What proportion of the activities includes partner interactions? (The majority of the activities should include partner interactions.) For more on Partner Interactions, see page 12.

Raising All Voices. How do all participants get the chance to speak in some way? For more on Raising All Voices, see page 9.

Experience. How do most of the activities engage the experience of the participants? How do the activities allow them to make personal meaning of the material? For more on Engaging the Experience of Participants, see page 3.

Objectives. How do the activities directly allow the participants to meet the objectives of each part of the training and the training as a whole? For more on Objectives, see page 18.

Time. How can the participants complete the activities in the time available, without feeling rushed or bored? For more on Time, see page 25.

Safety. Do any of the activities place the participants in situations where they will feel embarrassed, put on the spot or unprepared? For more on Safety, see page 5.

...the design of learning tasks, the atmosphere in the room, and the very design of small groups and materials convey to the adult learners that this experience will work for them. The context is safe...Safety does not take away any of the hard work involved in learning.

—Jane Vella

Step Six: Put It All Together

Once you have a draft design, it's time to put all the pieces together and make it flow. The following describes a method for putting it all together. For an example of a final design, see Appendix One.

- Go through your draft and **create** a final design. **Move** the parts around if you think it will help the flow. **Review** the activities and tasks to make sure people are moving around, talking with one another and practicing what they are learning.

- **Write** titles.

- **Bold** the action verbs.

- **Make** charts and handouts.

- **Gather** the materials you will need.

- **Establish** the training environment.

- **Check** the flow of information and activities for relevance to the needs assessment.

- **Clarify** the role of each co-facilitator if you are training in a team.

- **Review** the Activity Design Check-in one last time.

- **Run through** the activities, and where needed, practice on your own or with a colleague.

Practice Tip: Effective Charts and Handouts

Charts and handouts don't have to be fancy. Like everything in a training design, they fulfill a clear purpose. Here are a few guidelines:

- Print. Use large print (not script)—at least 1.5 to 2 inches high and across.

- Write titles. Always write a title at the top of the chart.

- Use colors. Use varied colored markers. For example, write the title in red then underline it in black. Write one line of text in green, the next in blue.

- Match the handouts. Ideally, have handouts to match the prepared charts so the participants are free to listen, engage and jot notes that help them make the information more personally meaningful.

If you need to make charts during a session, have a co-facilitator do the writing. If that isn't possible, be sure to stand to the side of the chart when you write, not directly in front of it. Write only as much as you need to write, for a clear purpose, and as noted above, use titles and colors to make the points clear. Use lined chart paper, if available, to keep the print readable. If you will send the notes on the charts to them at a later time, tell the participants so they know what kind of notes would be most useful for them to write down.

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Part Three
Facilitator Skills: Implementing the Design

Your role as a facilitator is directly linked with the training design. The more focus you place on yourself, the more you need to be entertaining and act as an expert.

When you place the focus on the participants, your role becomes one of moving people through the activities, helping them to see the connections among the activities and creating space for them to go as deeply as possible into their own experiences in order to make the learning meaningful to them.

Keep up the Energy of the Group
Following are some suggestions for keeping a training session energetic and engaging to a range of participants with different learning styles.

1) Time Tasks
Set a clear beginning and ending time for each activity or exercise. Announce when the time is up. Stick to the times you set or check in with participants if you are going to extend the time. Knowing how much time there is to work on something keeps people feeling grounded and clear about what's happening. The following are some sample trainer statements:

- *Talk in your small groups for five minutes, then we'll hear your responses.*

- *How about one more minute to finish up this exercise?*

2) Quantify Responses
Open-ended sharing is useful at times, but it can lead to rambling and tangents. If you quantify the responses you are more likely to generate ideas the groups can really hear and work with.

- *We'll hear one idea from each group.*

- *Pick the best. Pick the most surprising.*

3) Take Timed Breaks
Offer frequent short breaks. Start again on time, no matter who is missing.

- *We'll get started again in exactly five minutes.*

4) Use Partner Interactions
Keep up the "buzz." For more on partner interactions, see page 12.

- *Tell your partner about the most difficult meeting you've experienced.*

> *I am one dedicated person working for freedom.*
>
> —Septima Clark
> (Designer of the Citizenship Schools of the Civil Rights Movement)

5) Keep Moving
Create a design that has people moving around the room periodically.

- *Post your responses on our group chart at the front of the room.*

- *We'll walk around the room to look at what you made.*

- *Group One will meet in that corner, Group Two in this corner.*

6) Change Locations
Give the opportunity to complete tasks outside of the training room.

- *We'll go out to the park to ask people what they think of the new regulations.*

- *You can work on your sculptures outside if you want.*

- *There are two break-out rooms down the hallway.*

7) Summarize and Move on
Summarize what's been happening and move the process along.

- *So far, we've explored how leadership is a collective achievement. Let's move to another area—accountability.*

Invite Dialogue through Body Language
How you hold your arms, use your hands and position your head have a powerful effect on the way in which people respond to what you say or do as a trainer. If you sit while speaking with the full group, your body language is more relaxed and inviting, but avoid sitting behind a table, desk or podium while facilitating.

Practice Tip: Turn to the Person on Your Left...

When the energy lags, one of the quickest ways to get a buzz going is to ask the participants to turn to the person next to them and respond to a simple, interesting question related to the topic. The trainer says, **"*You have five minutes...*"** then flags them halfway so they feel propelled by the time limit. If it is an opinion-based question, giving them a time check at the halfway point helps make sure both parties have a chance to express their views. The trainer goes around to the groups and says, "You have about two-and-a-half minutes, so switch to hearing the other person in your pair, if you haven't done so yet."

BODY SCULPTING

Objective

By the end of this activity, participants will have: **demonstrated** inviting and non-inviting body poses and cited body language that does and does not invite dialogue.

Activity

Task One: Choose a partner. One is the sculptor, the other is the clay.

Task Two: In one minute, using verbal directions, **sculpt** your partner into a pose that shows a facilitator attitude that does *not* invite dialogue. (For example, the participant doing the sculpting says, *"Put your hand on your hip. Put your head down."* We recommend verbal directions, rather than direct touch, in order to build a sense of safety. (Touching other participants, as a sculptor would, makes some feel uncomfortable.)

Task Three: As a group, together we'll **name** what signals "non-invitation" to learners.

Task Four: Switch places. This time, using verbal directions, **sculpt** a pose that *does* invite dialogue.

Task Five: Together we'll **name** what is inviting to learners and why.

Materials

None

Wait for Responses and Work with Silence

You can teach yourself to wait at least five seconds for responses to your open questions. Waiting gives people time to think. Waiting creates safety, as participants come to understand they will not be rushed or forced to respond.

You can also teach yourself to wait for at least three people to comment before you say something. Trainers often have a need to be responsive and share information. If you wait and listen, however, a participant may say exactly what was on the tip of your tongue. As a result of waiting and letting someone from the group respond, the learning becomes more grounded in the participants' own experiences. You can create an environment in which they think, reflect and participate by choice, becoming engaged with and teaching each other.

You can try the following exercise with a co-worker or friend. Ask the person a question and then ask him or her to let you count to five before answering. Afterward, reverse roles and repeat the exercise.

Write down one word that describes your thoughts or feelings during the five seconds. Reflect on the following sentences and complete them:

1) *Silence makes me feel…*

2) *When I'm in a group where no one is talking I…*

Complete the following sentences, with as many possibilities as you can generate.

1) *When I ask for a volunteer and no one responds after five seconds, I could…*

2) *When it's clear that a particular participant cannot bear silence, I could…*

3) *When I'm not sure if participants are silent because they are disengaged, bored, or if they are actually thinking, I could…*

One reason trainers try to fill up the pauses is to avoid having one or two people dominate the discussions. When you build in frequent small group interactions, you reduce the possibility of this occurring. Also, instead of eliminating silence, you can proactively invite others in by saying, "How about if we hear from someone we haven't heard from yet?"

Affirm Participant Contributions

Consistently affirming the contributions that participants make encourages them to speak and creates a sense of safety. While comments like *"great!"* and *"good point!"* can be helpful, they become value-laden when overused. Participants may begin to try to please you, based on what they think you want to hear.

You can acknowledge individuals and their contributions without needing to state your opinion. When someone speaks in the large group, especially for the first time, you can say, for example: "Thank you, Maria," or "Thanks for bringing that up. Could you tell us more about that, Maria?" or "Did the rest of you hear what Maria said?"

You can nod your head and keep your arms loose and uncrossed. You can make eye contact with Maria, but also with others in the room. For instance, when it seems like someone is focused on addressing you alone, nod your head, and look around to encourage the participants to connect with each other. The key is to be yourself, to be authentic in what you acknowledge and how you do so and not appear fake or forced.

Weave Concepts Together

You can tie concepts together in order to reinforce ideas, keep the training well paced, maintain the flow and sustain the energy of the group. This is called weaving, and it usually goes hand-in-hand with using affirmations. Some examples follow:

- Thank someone for an observation that moves the group to the next task.

- Refer back to what someone said earlier, linking it with a new comment or question.

- Ask clarifying questions that help to draw out points the participant is making: *"Tell us more about that…"*

- Make a summary statement that ties together the various participant comments.

- Move from the summary into the future—"Now that you've reached those conclusions, what's next?"—or let participants know what comes next in the training.

Provide Examples of Activities

Take a few minutes to give an example of a complicated activity before asking the participants to take it on. For instance, if you are using a visual organizer such as the sun chart we describe on page 4, draw a sun chart and show the participants exactly what the activity entails. Then you can ask directly, "Does everyone understand how to do the activity?"

Connect with Small Groups

As participants work in pairs or small groups, it is better to go around to the groups and check in with them about their questions and how much time they have to complete the activity than it is to stand in the front of the room and yell out, "Two more minutes!" It creates a more relaxed atmosphere and gives you a better chance to assess how the activities are going.

State the Follow-up and Conduct an Evaluation

If you are going to be sending the participants any notes or other information following the training, be sure to let them know about it, and make sure you have accurate contact information on hand.

While the closing activity often serves as a way of reviewing the activities of the training, asking the participants to complete a simple, written evaluation is a way of getting important information for improving your training skills and sessions in the future. It also demonstrates to participants that you value their feedback.

> ### Practice Tip: Mean What You Say about Time
>
> When you say a break will be five minutes, start the training again in exactly five minutes. If you say the participants have 'another minute' to finish their conversations, mean it. Having a small digital watch or a clock facing you can be helpful. Sticking with the timing builds a sense of safety and trust and keeps up the energy of the group.

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Appendix One
Sample Design for a 40-Minute Session

If Not Now...When?
Working for Social Change and Mind/Body Wellness

Goal: For social change workers to create their own wellness tools.

Activity One (warm up)
A Wellness Inventory: What Have I Done for Myself Lately?

Activities/Tasks:
- **Form** a circle. **Turn** to the person on your left, **introduce** yourself and **share** one thing you currently do to stay healthy and one area where you'd like to take action to be healthier.
- **Introduce** your partner to the group.
- Together, we'll **list** the wellness areas that concern us.

Objective: By the end of this exercise participants will have: **named** their own wellness strategies and needs.

Activity Two
My Wellness Worksheet

Activities/Tasks:
- **Complete** your wellness worksheet.
- Working with a partner, **name** three steps you can take toward your wellness goals.
- **Write** your steps on Post-its and place them on our chart.

Objective: By the end of this exercise participants will have: **identified** three steps to wellness.

Activity Three
Ten Tips for Living a Whole Life

Activities/Tasks:
- Using the chart, we'll **generate** 10 tips we can each use for living a healthier life.

Objective: By the end of this exercise participants will have: **listed** 10 wellness tips.

Activity Four
Bringing It All Together: Our Circle of Support

Activities/Tasks:
- **Form** a circle.
- **Take** one thing from the circle that you learned today, and **offer** one thing that you believe can help others reach their wellness goals. Share your thoughts or review them for yourself.

Objective: By the end of this exercise participants will have: **drawn** support for reaching their wellness goals.

Appendix Two
Facilitation Tools

RCLA Practice Notes Available Online

Please visit **http://www.wagner.nyu.edu/leadership/practice_notes.php** for our regularly updated guides to facilitation methods using storytelling, fishbowls and innovative visual tools. These RCLA Practice Notes offer practical guidance drawing from the direct experiences of leaders.

Visual Explorer Playing Cards: Center for Creative Leadership

Visual Explorer is a tool for enabling dialogue through the use of visual imagery.

More information is available at http://www.ccl.org

Appendix Three
Activity Samples

The following are examples of activities designed according to the techniques we describe in this handbook.

Headline Futures (To explore organizational purpose)

- It's five years *(six months, 10 years)* from today. With a partner, **write** the headline about your group that appeared in this morning's *New York Times* (*Daily News, El Diario*).

- Together, we'll **post** and **examine** your headlines and **explore** what this tells us about what you are trying to build today.

This activity is fun, creative and revealing. It makes a good opener.

Head, Heart, Gut: What Motivates Me (To understand what drives people)

- We'll **view** an example of a Head, Heart, Gut chart.

(Trainer posts a pre-made stick person chart of his or her own, using the questions below as a guide. The chart should be simple, focused on one aspect of the trainer's motivations, and touch on something comfortably personal so that the participants feel invited to be "real." The trainer talks about what is close enough to be relevant, with enough distance and discretion to be safe. An example might be working for an end to drunk driving after a brother suffered injuries from being hit by a drunk driver.)

- **Create** your own stick person chart using the following questions as a guide.
  – Head: What do I think is socially, politically or economically wrong?
  – Heart: What motivates me on a feeling level?
  – Gut: What motivates me most personally—what do I need?
  – Hands and feet: What do I like to do?

- **Post** your chart when you are done. *(Build the learning environment!)*

- **Share** your creation with a partner. *(Raise all voices!)*

- Together we'll **hear** a sample. What surprised you? *(Keep it safe!)*

This is a good example of a visual, auditory and kinesthetic activity. It also builds group cohesion, getting people thinking about and sharing what's important to them.

Zip Songs (Creativity with a purpose: to summarize information, celebrate and build energy; see sample zip song below)

- **Listen** as the trainers demonstrate a Zip Song.

- In groups of three, **select** a popular song to which you all know the melody.

- **Zip out** the lyrics. **Write** your own lyrics about why your organization practices shared leadership.

- **Find** a private corner to **practice** your new creation. We'll all **perform**.

- You have six minutes…**go!**

Everyone groans at first, then they love it!

Sample Zip Song on why your organization practices shared leadership: Sing to the tune of Happy Birthday, "More leaders not one. We can't be undone. We lead, we don't follow. Our leaders are one!

Gimme, Gimme (To understand tactics)

- **Look around** and **identify** something another participant has that you want (for example, a sweater, a hair clip or a notebook).

- A volunteer will **name** the person who has something she or he wants. They will both **go** to the front of the room. The volunteer will now **convince** the other person to hand it over.

- Together, we'll **name** the tactics used and **ask** the volunteers how it felt to use different tactics and to be persuaded or not by them.

This is an example of playing a game for a clear purpose, not just because it's fun.

Globalization Limbo (A global activity)

- **Find** a partner and **look at** one another's clothing labels to see where the clothing was made. (Participants are likely to see that their clothing was made all over the globe.)

- **Review** the "Wages around the World" statistics listing wage levels around the globe.

- As two participants hold the ends of a limbo stick, **report back** where your clothing was made.

- As the stick holders move the stick up or down, depending on the wage level, **do the limbo**, trying to bend your body to pass under the limbo stick.

- We'll **debrief**, using the following questions (designed to reflect the goals of the training). For example: What does it mean when the clothing we wear was made in other countries? What does it mean when we pay $20 for a shirt that someone earned a few cents to produce? Who profits from this situation? What policies perpetuate this situation? What effect does this kind of trade have on jobs and wages in our community?

This is an example of an activity that takes a big social justice concept and explores it in a fun way (it is especially appealing to kinesthetic learners).

Wages around the World. The following are approximate hourly wages, as reported to the National Labor Committee by workers in these countries (1998 statistics).

United States: $8.42	Guatemala: $.37 to $.50	Nicaragua: $.23
Bangladesh: $.09 to $.20	Haiti: $.30	Pakistan: $.20 to $.26
Burma: $.04	Honduras: $.43	Peru: $.90
China: $.23	India: $.20 to $.30	Philippines: $.58 to $.76
Colombia: $.70 to $.80	Indonesia: $.10	Thailand: $.78
Dominican Republic: $.69	Malaysia: $1.00	
El Salvador: $.59	Mexico: $.50 to $.54	

Warm-up Activity: Learning-Styles Bingo (or any kind of Bingo game, used to connect people with one another and start out with energy)

Briefly **examine** your Learning Styles Bingo sheet. **Ask** other participants if they fit the descriptions and when you find someone who fits, write her or his name in the square. You can use each participant only once. Do not use yourself or the trainer. It's BINGO across, down, up or diagonal!

Learning Styles BINGO! Find someone who...

You can use Bingo games on any topic. It is a game with a purpose that introduces the concepts and gets people talking. Giving the winner a cookie or prize, then passing around something similar to everyone, also makes it fun.

Loves to read	Can do basic math in her/his head	Rarely takes notes but remembers everything	Prefers to put together a new piece of furniture without reading the directions
Is an excellent speller	Can listen better while doodling	Mind wanders when listening to news on the radio	Isn't such a good speller
Can remember directions to a place without writing them down	Isn't that fond of reading	Has trouble sitting still after 15 minutes of lecture	Takes a lot of notes in classes or meetings
Likes to talk with others about what they are learning or new ideas they have	Can watch a cooking show and go straight to the kitchen and make the demonstrated dish	Is easily distracted during meetings	Likes learning with music playing in the background

Appendix Four
Sample Resources

The following provides a brief sampling of some classic texts that describe Popular Education training and in some ways influence what we describe in this handbook. Most of the authors listed here have written other books or are the subject of books about their educational work, so please consider this list to be a starting point. There are a range of additional books by others that offer examples of specific kinds of training activities, such as team-building activities or training closers—check the adult education shelves of your local library or bookstore. Sample trainings and training activities for your specific social justice focus may also be available online.

Following the listing of texts, we also include contact information for some organizations that support Popular Education trainers and provide training tools, acknowledging that the work of many of these organizations is evident in the approach to training that we describe here. Again, the field is vast and this list represents a sample of what is available.

Sample Resource Books

Clark, Septima Poinsette and Cynthia Stokes Brown. *Ready from Within: A First Person Narrative (Septima Clark and the Civil Rights Movement)*. Africa World Press (1990).

Freire, Paulo. *Pedagogy of the Oppressed.* New York: Continuum (30th Anniversary Edition, 2000).

Gardner, Howard. *Multiple Intelligences: New Horizons in Theory and Practice*. New York: Basic Books (2006).

Horton, Myles and Paulo Freire. (Edited by Brenda Bell, John Gaventa, and John Peters). *We Make The Road by Walking: Conversations on Education and Social Change.* Philadelphia: Temple University Press (1990).

Norris, Joye. *Ya Gotta Have Heart! A Community Educator's Guide to Facilitation Practices.* North Myrtle Beach: Learning by Dialogue (2008).

Vella, Jane. *Learning to Listen, Learning to Teach: The Power of Dialogue in Educating Adults.* San Francisco: Jossey-Bass (2002).

Sample Resource Organizations

Center for Creative Leadership (www.ccl.org)
Global Learning Partners (www.globalearning.com)
Highlander Research and Education Center (www.highlandercenter.org)
Learning by Dialogue (www.learningbydialogue.com)
Northwest Federation of Community Organizations (www.nwfco.org)
Project South (www.projectsouth.org)

Sample Online Resource

Civic Education and Community Mobilisation: Train-the-Trainer Manual.
http://distancelearning.hrea.org/

Research Center for Leadership in Action
New York University's Robert F. Wagner
Graduate School of Public Service

The Research Center for Leadership in Action is opening up new possibilities for understanding how people at all levels of organizations and across all sectors of society can produce leadership as a collective achievement. This work radically expands the existing notion of who can be a leader, enabling more people to see themselves reflected in the leadership that gets recognized and find their own way into leadership themselves. By deepening and diversifying the pool of people taking up leadership, RCLA is strengthening organizations, communities and, ultimately, democracy.

With this vision in mind, RCLA builds knowledge and capacity for leadership that transforms society. The Center works across the diverse domains of public service, attending to both the individual and collective dimensions of leadership. Our greatest asset is our unique ability to partner with leaders to translate ideas into action and build knowledge from the ground up. As a result, we contribute breakthrough ideas to the worlds of scholarship and practice.

Launched in 2003 with core support from the Ford Foundation, our partners include more than 700 social change organizations, universities and leadership centers in the US and abroad, and local and state government leaders, as well as the Edna McConnell Clark Foundation, Annie E. Casey Foundation, Rockefeller Foundation, Open Society Institute, AVINA Foundation, and Accenture.

Learn more at http://wagner.nyu.edu/leadership.
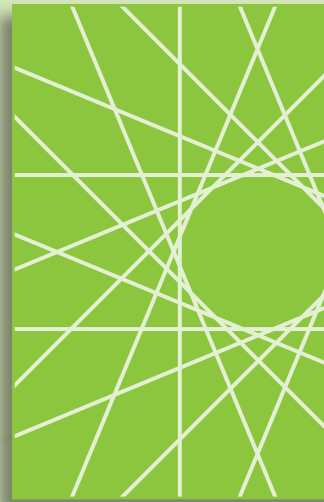
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