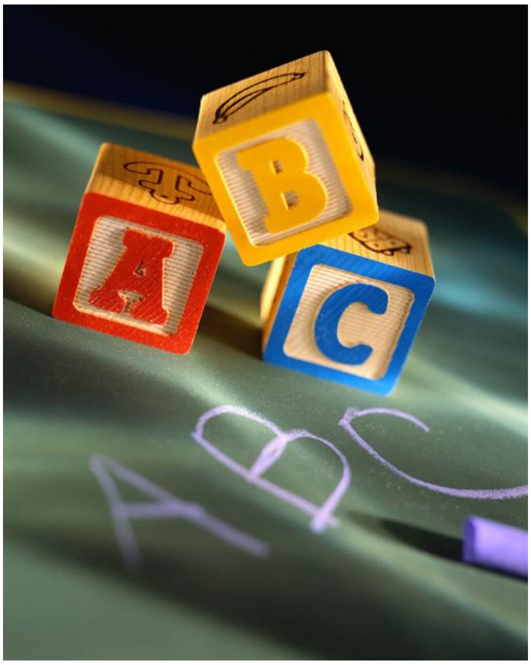
International Training Centre

DRAFT

THE LEARNING COMPENDIUM

WHAT YOU NEED TO KNOW WHEN WORKING WITH ADULTS IN LEARNING EVENTS



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The Learning Compendium

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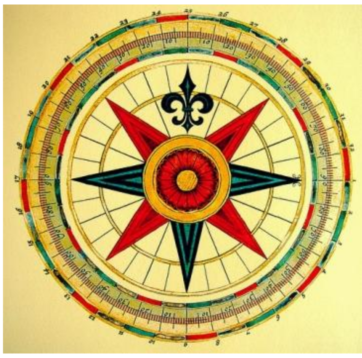
Introduction

1. THE LEARNING ENVIRONMENT



As a trainer, you have a key role in building an environment which is conducive for learning.

The first impression participants have (of you, the group and the space) is very important and may strongly affect how they feel during the course.

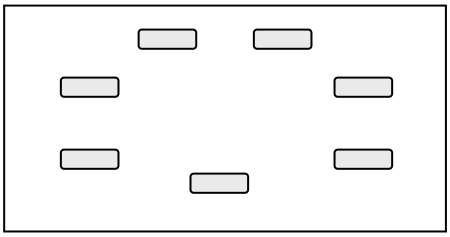
If possible, be in class before your participants and greet them one by one, introducing yourself and making sure they feel at ease.

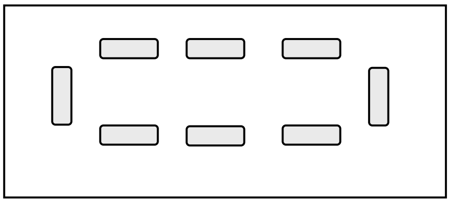
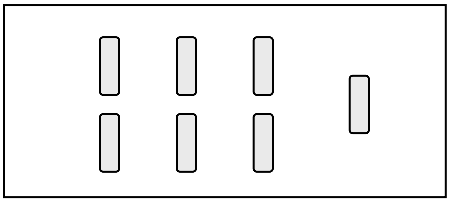
After the opening speech, explain that they are the ones that can make the course successful and it is important that everyone knows each other and feels at ease.

The first exercise will therefore be an 'ice-breaker' related to the course goal and contents.

A second exercise will enable participants to share their expectations of the course. The exercise will be particularly important for you, because, on the one hand, you will obtain a clear picture of what participants aim at learning and, on the other hand, you will have a consistent basis for presenting the course's learning objectives and agenda.

	Training pill 	*Adults learn only…* *…if they feel comfortable and respected in a non-threatening learning environment.*
	Space 	The space you have for the training, and the way you organize it, is more important than one could think. Make sure that your training space is: • Big enough • Easily accessible (for disabled people also)

		• Clean and free of risks (electrical, physical) • Not noisy • Well lit • Neither too hot or cold • With good acoustics Once you have checked all the above features, consider how you are going to organize your learning space. Tables and chairs can become ‘barriers’. They set the ambience. You can have: • A *circle*: creates an informal setting and a feeling of equality between the participants and the trainer. Placing the tables and chairs in a circle facilitates group work and participation  ▪ A *conference*: sets a relatively formal tone but places everyone at the same level because no distance or differentiation of position puts a barrier between the trainer and the participants.

		 ▪ A *class*: creates a formal environment and puts a distance between the participants and the facilitator. This is typical of the conventional way of delivering training activities (i.e. the participants play a passive role).  In order to make possible the application of the learner-centered approach and promote the participation of everyone, the ‘circle’ setting is strongly advisable. If you do not need tables, we suggest using chairs only. This allows freedom of movement and brings the group members closer together. Also, remember that there are many other shapes your space can have, depending on the method you need to use to facilitate the achievement of the learning objectives. Do not be afraid to move walls, tables, chairs and people!

BUILDING GOOD WORKING RELATIONSHIPS

BREAKING THE ICE AND INTRODUCING THE GROUP AND THE COURSE

Training objectives 	In this session you will help your participants to: • 'break the ice' and feel comfortable with the group; • begin to know each other; • become familiar with the course subject matter; • exchange their expectations of the course; • identify those expectations that cannot be satisfied by the training; • agree on the learning objectives of the course; • recognize how the contents, which will enable them to achieve the learning objectives, have been organized in the course agenda.
1. *Ice-breaker* *Note: This exercise has been designed for social security officers who are participating in a course on governance. It can be adapted to many other situations.* *INTERNAL NOTE: we can also change this*	*Before the workshop:* Prepare envelopes - with instructions (A) and (B). (Find instructions (A) and (B) in the Annexes.) Envelopes with instructions (A) are addressed to social security officials. They should contain: ◊ the instructions (written in blue) and ◊ a badge holder with the colour blue. Envelopes with instructions (B) are addressed to beneficiaries. They should contain: ◊ the instructions (written in red) and ◊ a badge holder with the colour red. *During the workshop:* Distribute the envelopes, one per participant, randomly. Half of the class should receive the envelope with instructions (A)

<table>
<tr>
<td></td>
<td>and the other half the envelope with instructions (B).

After the exercise, dedicate 10 minutes to the plenary and ask participants:

◊ How did you feel: was it difficult to explain the major concepts related to social protection and the benefits people are entitled to?

◊ How do you feel now: Are you clear about the concepts and the types of benefits included in a social protection scheme?</td>
</tr>
<tr>
<td colspan="2">Annex 1 – Instructions (A) for social security officials

Greetings!

You are a proactive social security official (put on the badge holder with the colour blue, so that the others can recognize you).

You are very concerned about the level of awareness the citizens of your country (write the name of your country on your blue badge) have in relation to their social security benefits and their understanding of the national social protection system.

Together with your colleagues, you have organized an awareness raising campaign in which you meet citizens of all ages, employed or not.

Go around in the class and start talking to a person who wears a badge holder with the colour red: s/he is a beneficiary. Very briefly, introduce yourself and ask the other person to do same. You should both specify your name, surname, country and organization.

Meet as many beneficiaries as possible.

To each beneficiary, you should explain:

◊ What is the social protection scheme;

◊ What it aims at;

◊ In which cases provision of transfers to individuals is foreseen (e.g. old-age, maternity) and how the transfers are financed;

◊ What are the social insurance schemes;

◊ What are the non-contributory schemes.

Try to be very clear. Listen to the beneficiaries you are meeting and explain and clarify when</td>
</tr>
</table>

necessary.

Good luck!

Annex 2 – Instructions (B) for beneficiaries.

Greetings!

You are a citizen (put on your badge with the colour red) and would like to know more about the social protection schemes of various countries.

Go around the class and meet the social security officials (they wear the badge holder with the colour blue). Try to meet as many as you can.

First, very briefly introduce yourself and listen to the other person. You should both specify your name, surname, country and organization.

Then, listen to the explanation of the social security official and ask questions if you have doubts or if you like to know more.

Enjoy your discovery!

	Training pill 	• *'Ice-breakers', animation exercises and energizers should...* *...always be related to the course subject matter. In fact:* • *Adults only learn...* *...if the contents make sense to them.*
	Tips 	Prepare the envelopes with the instructions and the badge holders well in advance. Double check the envelopes and the instructions. Distribute the envelopes without taking into consideration the real

<table>
<tr><td></td><td></td><td>role/job/position of the participants. The exercise is a role play and it can be good if people play a role different from real life.

If you do not have badge holders, use another object (coloured post-its, huts, T-shirts, etc.) to differentiate the people and the two roles they are playing.

Make sure participants can easily circulate in the class.</td></tr>
<tr><td></td><td>Material

</td><td>An envelope per participant, with the instructions and the badge holders (with the colours blue or red)</td></tr>
<tr><td></td><td>Space

</td><td>Big and free space to enable circulation.</td></tr>
<tr><td></td><td>Time

</td><td>25 minutes for the role play

15 minutes for the plenary

Total: 40 minutes</td></tr>
<tr><td>2. Discussion of expectations</td><td colspan="2">Form groups of 4-5, people randomly (by using, for example, coloured cards or candies.)

Give 4 cards (of 2 different colours. E.g. 2 red cards and 2 green cards) to each group. Ask the groups:

◊ Why did you come to this course?

◊ What can you bring to this course?

Explain that they have to be honest and spontaneous with their answers. They have 10 minutes to discuss in groups and negotiate 2 answers to each question. They should write their answers on the cards (one per card) - using the markers – being</td></tr>
</table>

	concise and using key terms. When the time is over, ask one person per group to come to the board, read the group's cards and stick them on the wall. If they can, they should add to what other groups have already said and cluster their answers. You should help the groups' representatives with the cards' systematization.	
	Training pill 	*Adults only learn…* *…if the can relate the learning to past, present or future events.*
	Material 	Coloured cards (2 colours) or big coloured post-its Markers Tape
	Time 	10 minutes to discuss the groups' answers 5 minutes to synthesize the group's answers and write them on the 2 cards 3 minutes per group to present the answers Total: 27-30 minutes (with 4 groups)
3. Presentation of the course objectives and agenda	Ask the participants to take the course description and agenda. Using the participants' expectations as a reference, present the learning objectives of the course (which should be clearly stated, in terms of 'actions', in the course description). By presenting the objectives, you will have the opportunity to explain which expectations will be covered and which are not	

<table>
<tr><td></td><td colspan="2">within the scope of the training.

Present the course agenda to indicate how the learning objectives will be achieved.

Take this opportunity to provide additional administrative and logistics information related to the course.

Green ideas:

In particular, explain that the workshop will have to be environmentally friendly:

◊ paper will not be wasted and only when really necessary will copies of the documents be made: in fact, all the documents (including the group works' results) will be available in the course Web site or CD;

◊ everyone should put her/his name on the paper glasses and cups;

◊ doors should be kept closed when the heating or the air conditioning is on;

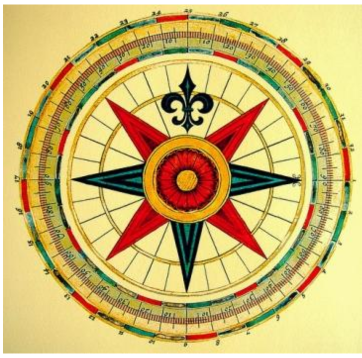
◊ all ideas to make the course 'green' will be most welcome!</td></tr>
<tr><td></td><td>Tips

</td><td>Use this presentation to ensure that all your participants are aware of the information contained in the course description and agenda.

Have the learning objectives clearly written on big post-its and stick them on the wall, so that they can stay as reference for the whole training.

Go back to the learning objectives session- by-session or day-by-day, so that participants are reminded of them and can easily visualize the</td></tr>
</table>

		logical flow of the learning process.
	Material 	Course description Course agenda
	Time 	15 minutes



The ultimate purpose of training is ‘change’.

After a short, intensive and generally costly training process, participants are expected to leave the class with new competencies. In order to make this possible, it is crucial that the participants be at the heart of the activity and have the opportunity to put in practice the knowledge they acquire.

The so called ‘learner-centered’ approach helps trainers to ensure that participants not only acquire technical knowledge, but can perform new functions or undertake activities in a different, more effective, way.

Having the participants ‘at the centre’ of the training activity means that the trainer:

◊ becomes a learning facilitator, collaborator, a knowledge navigator and a co-learner. S/he no longer is a knowledge transmitter, the unique content expert, the source of all answers;

◊ gives learners options and responsibilities for their own learning. S/he does not control and direct all aspects of the training and learning process.

It also means that the participant:

◊ is active in the learning process. S/he is not a passive recipient of information;

◊ shares competences and builds knowledge in a collaborative manner.

To enable the above shifts in the trainer's and participant's roles, a new learning environment is needed, in which the following are made possible and encouraged:

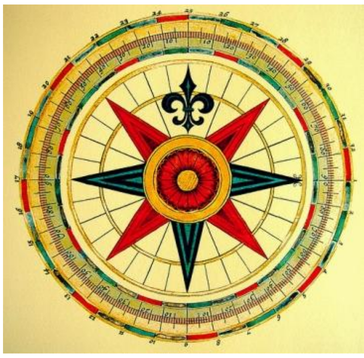
- ◊ active, exploratory, inquiry-based learning;
- ◊ critical thinking and informal decision-making;
- ◊ proactive, planned action;
- ◊ authentic, 'real world' context;
- ◊ multisensory stimulation.

Only a wide variety of training and learning methods – from the more traditional to the more innovative - can create a conducive learning environment and satisfy the several learning styles of your participants.

As trainers, you have the responsibility of blending your methods as much as possible (as proposed in this Trainer Kit).

	Wisdom pill 	*Confucius said:* *Tell me and I will forget,* *Show me and I will understand,* *Involve me and I will learn.*

2. What do we learn?



Adults are lifelong learners. From birth onward we learn and assimilate what we have just learned into what we already know. Learning can be categorized into the domains of *knowledge*, how we view ourselves as learners and how we *feel* as practitioners, and the *skills* we need to engage in new activities.

In fact, whatever we learn is the result of the appropriate combination of:

- *knowledge* (concepts, rules, theories, ideas, etc.),
- *skills or psychomotor abilities* (ability to do things with our hands and body),
- *attitudes and feelings* (the way we learn and approach things, according to our scale of values).

Knowledge, skills and attitudes are often indicated as *cognitive, psychomotor* and *affective* learning domains, as they have been identified and described by the educational psychologist Benjamin Bloom (1956).

Cognitive domain

This domain includes content knowledge and the development of intellectual skills. This embraces the recall or recognition of specific facts and concepts that serve to develop intellectual abilities and skills. There are six major categories, starting from the simplest behaviour (recalling facts) to the most complex (evaluation).

Affective domain

How does one approach learning and new functions - with confidence, a 'can do' attitude or with incertitude and a negative feeling? Which attitudes should a learner develop or acquire? The affective domain includes feelings, values, appreciation, enthusiasms, motivations, and attitudes.

Psychomotor domain

The psychomotor domain includes physical movement, coordination, and use of the motor-skill areas. Development of these skills requires practice and is measured in terms of speed, precision, distance, procedures, or techniques in execution[1].

The following is a simple adapted 'at-a-glance' representation of the learning domains' taxonomy developed by Bloom.

[1] Source: http://serc.carleton.edu/introgeo/assessment/domains.html

Cognitive		Affective		Psychomotor
Knowledge		**Attitude**		**Skills**
1. Recall data		1. Receive (awareness)		1. Imitation (copy)
2. Understand		2. Respond (react)		2. Manipulation (follow instructions)
3. Apply (use)		3. Value (understand and act)		3. Develop Precision
4. Analyze (structure/elements)		4. Organize personal value system		4. Articulation (combine, integrate related skills)
5. Synthesize (create/build)		5. Internalize value system (adopt behaviour)		5. Naturalization (automate, become expert)
6. Evaluate (assess, judge in relational terms)				

Depending on the subject matter, one or two domains can prevail, but the three are somehow always there. For example, we could not be competent in running a session without mastering:

- the subject matter;
- appropriate body language and the necessary skills to use a PC and other training aids;
- adequate behaviour when addressing participants to make them feel respected and motivated as well as when addressing colleagues to ensure a conducive working and learning environment.

Similarly, a board member, in order to perform his/her several functions efficiently, needs to:

- acquire the basic concepts and social norms of his/her field of work;
- possess the needed (psychomotor) abilities and the appropriate body language;
- respect and defend a set of attitudes, values, and motivations in line with the board's objectives.

In fact, according to the literature, a *competence* is generally defined as *the combination of knowledge, skills and attitudes that a person puts into play in performing a productive function.*

We can list two major implications of the *competence* concept:

- Adaptability: a competent professional is able to perform in different contexts;
- Responsibility: a competent professional is responsible for his/her performance and fully aware of the implications of his/her actions.

The competency-based approach ensures that training fully responds to learning necessities and learners become able to perform according to their work requirements.

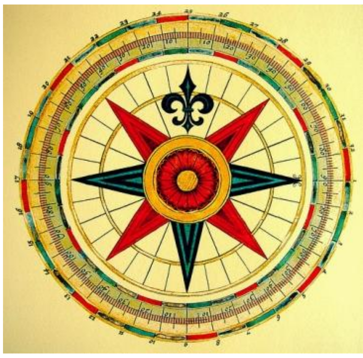
However, as mentioned in the paragraph "You should know that…", within a learning process, the affective domain is often neglected and, as one can imagine, this negatively affects learners' performance.

Therefore, we suggest that you make sure attitudes, feelings, values, motivation and ethics are part of your training by facilitating the exercises (or some of them) proposed here.

		What is the **affective domain**? The affective domain describes learning objectives that emphasize a feeling, emotion, or a degree of acceptance or rejection. Affective objectives vary from simple attention to selected phenomena to complex, but internally consistent, qualities of character and conscience. We find a large number of such objectives in the literature expressed as interests, attitudes, appreciations, values, and emotional sets or biases[2].
	Training pill 	*When talking about attitudes, remember that trainers should not only help participants to acquire the needed ones in their daily work, but also, facilitate learning by boosting the 'right attitude' toward learning.* "Research has shown that good everyday teaching practices can do more to counter student apathy than special efforts to attack motivation directly ." From Barbara Gross Davis, in Ericksen, 1978

2 Source: *What is the Affective Domain anyway?* Summary compiled by Karin Kirk. On the Cutting Edge, http://serc.carleton.edu/NAGTWorkshops/index.html

3. How do we learn?



Learning styles are various approaches or ways of learning. As a trainer, you should be aware that each person has different learning styles and consequently prefers different training techniques. Learning styles are not fixed. People can develop ability in less dominant styles, as well as further develop styles that they already use well.

Learning styles have a great influence on the learning process. They guide the way people learn, since they define the way people internally represent experiences, recall information, and even the words they choose.

Research shows that each learning style uses different parts of the brain. By involving more of the brain during learning, people remember more of what they learn[3].

Facilitating multiple styles for learning is a relatively new approach and is in line with the learner-centred approach, which implies that the learner is at the heart of the training and learning process and he/she takes the lead and the responsibility for his/her improvement.

What is the **learner-centred** approach?

It is a paradigm shift from the traditional underpinning of education where learning is upheld as a result of, and a response to the transmission of authoritative and coded knowledge. It legitimizes learners' experiences by allowing space for learners to participate in the process of acquiring knowledge. The learner-centred approach does not entail diminished teacher or trainer roles. Rather, it requires teachers and trainers to impart their knowledge and resources to co-produce possible and effective learning for and with the learners.

Source: Centre for the Study of Education and Work (http://www.learningwork.ca/csew)

The learner-centred approach has proven to be effective and most needed, particularly when the

[3] Adapted from: http://www.learning-styles-online.com

participants are adults, with little time and a great need to acquire competences that can be applied straight away.

Taking into consideration the variety of learning styles and applying a learner-centered approach means that the trainer uses a rich mix of methods that can satisfy everyone's preferences. This is why we strongly suggest applying and adapting the various techniques and methods (and related tools) proposed in this Trainer Kit.

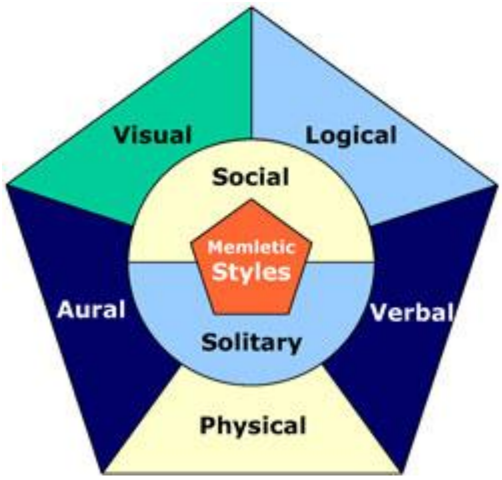
You can help your participants to recognize and understand their own learning styles. This will improve the speed and quality of their learning, while providing you with important information on how to help them.

There are several classifications of learning styles. However, we can refer to two broad categories:

1. *The learning styles determined by the "preferred sense"*
2. *The Kolb's model and the Honey and Mumford's variation*

1. Learning styles determined by the "preferred sense"

According to this model one can identify up to four learning styles:



Visual (spatial): one prefers using pictures, images, and spatial understanding.

Audio or aural (auditory-musical): one prefers listening to speeches, sound and music.

Reading and writing: one prefers using words, reading and writing.

Kinesthetic or physical: one prefers using the body, hands and sense of touch.

To the above, which is called 'The VARK model', the following can be added:

Logical (mathematical): one prefers using logic, reasoning and systems.

Social (interpersonal): one prefers learning in groups or with other people.

Solitary (intrapersonal): one prefers working alone and using self-study.

An easy and quick way to help your participants to find out more about their learning styles is to invite them to complete a learning styles questionnaire online, such as:

- Free learning styles inventory, including graphical results (http://www.learning-styles-online.com/inventory/#Online)
- The VARK questionnaire[4]

  http://www.vark-learn.com/english/page.asp?p=questionnaire

2. Kolb's model and the Honey and Mumford's variation

David Kolb published his learning styles model in 1984. The model gave rise to related terms such as Kolb's experiential learning theory (ELT), and Kolb's learning styles inventory (LSI).

Kolb's learning theory sets out four distinct learning styles, which are based on a four-stage learning cycle. In this respect Kolb's model is particularly elegant, since it offers both a way to understand individual people's different learning styles, and also an explanation of a cycle of experiential learning that applies to us all.

According to Kolb's experimental learning theory, 'immediate or concrete experiences' provide a basis for 'observations and reflections'. These 'observations and reflections' are assimilated and distilled into 'abstract concepts' producing new implications for action which can be 'actively tested' and create new experiences.

Kolb's model works on two levels:

(1) a four-stage cycle:

- **Concrete Experience - (CE)**
- **Reflective Observation - (RO)**

[4] **What do we know about VARK and its accuracy?**
After each person completes the questionnaire they are asked to provide information about themselves. Most do. One question asks whether their VARK profile matches their perception of their preferences for learning. The other options are "Don't Know" and "No Match". The percentages for those aged 19 or older are:

Match = 58%
Don't Know = 38%
No match = 4%

Although self perceptions are not always reliable these figures support the value of the VARK questionnaire. Teachers, those who have used VARK before and older respondents have a higher figures for the "match" statistic.

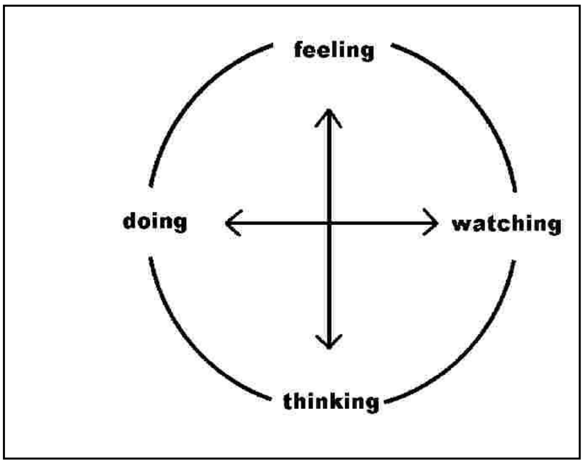
- **Abstract Conceptualization - (AC)**
- **Active Experimentation - (AE)**

and **(2) four-type definition of learning styles**, (each representing the combination of two preferred styles, rather like a two-by-two matrix of the four-stage cycle styles, as illustrated below), for which Kolb used the terms:

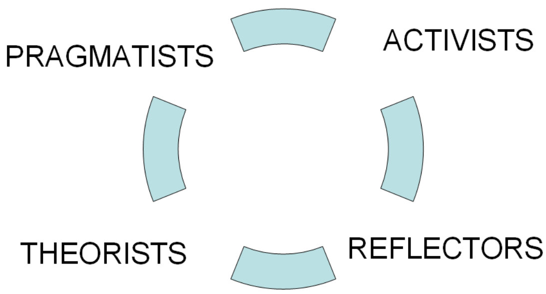
1. **Diverging (CE/RO)**
2. **Assimilating (AC/RO)**
3. **Converging (AC/AE)**
4. **Accommodating (CE/AE)**

Honey and Mumford (H&M) have identified four key stages/styles, by interpreting Kolb's model.

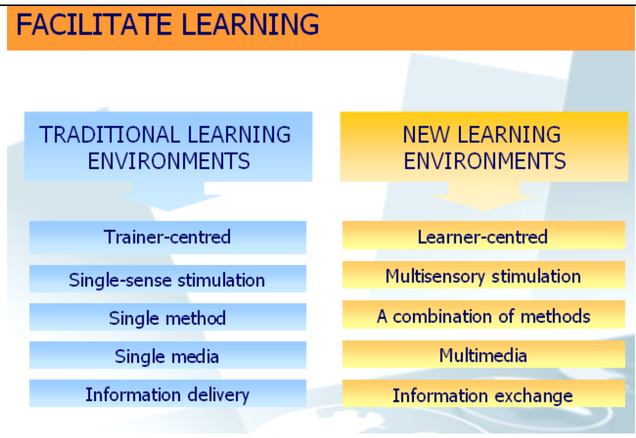
People can identify themselves as 'activists', 'reflectors', 'theorists' and 'pragmatists'. A few features of these four types are the following:

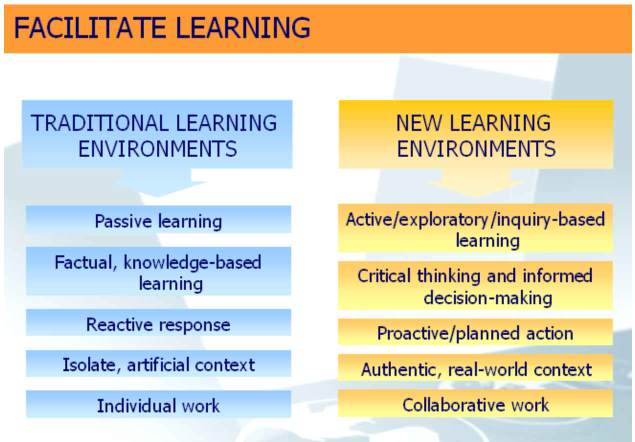


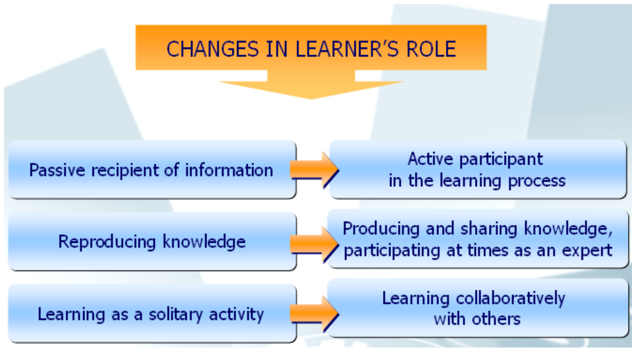
1. **Having an Experience, Activists**: 'here and now', gregarious, seek challenge and immediate experience, open-minded, bored with implementation.
2. **Reviewing the Experience, Reflectors**: 'stand back', gather data, ponder and analyse, delay reaching conclusions, listen before speaking, thoughtful.
3. **Concluding from the Experience, Theorists**: think things through in logical steps, assimilate disparate facts into coherent theories, rationally objective, reject subjectivity and flippancy.
4. **Planning the next steps, Pragmatists**: seek and try out new ideas, practical, down-to-earth, enjoy problem solving and decision-making quickly, bored with long discussions.

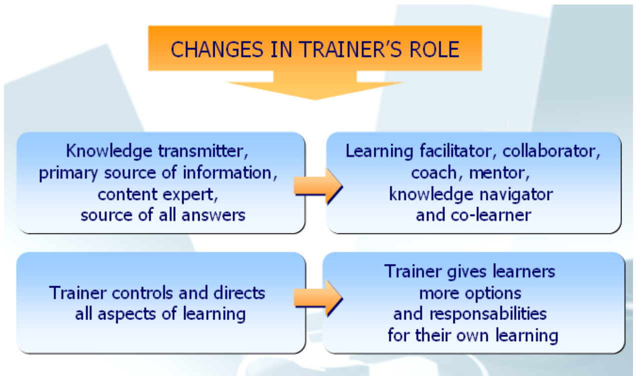


Training pill







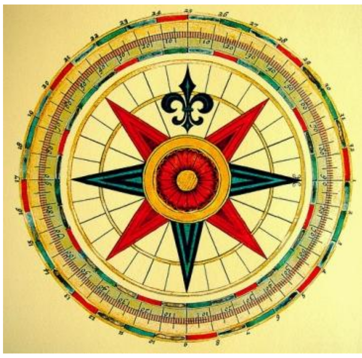


	Wisdom pill 	*William Arthur Ward said:* *The mediocre teacher tells. The good teacher explains. The superior teacher demonstrates. The great teacher inspires.*

4.THE GROUP

Star Trek, Vulcan Greeting:

Greetings! I am pleased to see that we are different. May we together become greater than the sum of us.



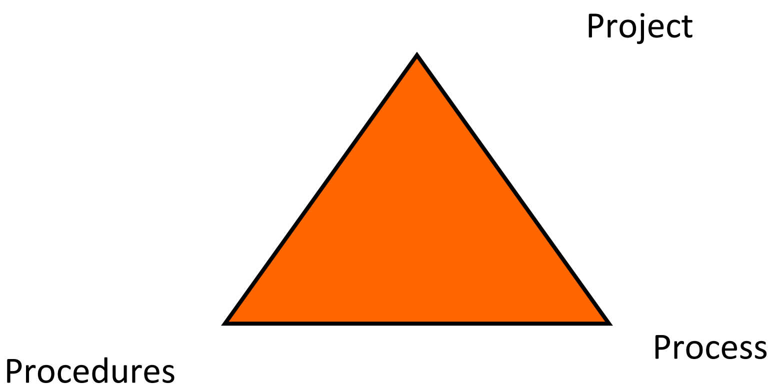
A key competence a trainer should master is ‘managing the group’.

In fact, in a class context, while adults learn individually (and everyone learns in a different, very special way), they build knowledge in a collaborative manner.

Therefore, a trainer should be aware of *what is a group* and what its life cycle is.

There are many theoretical models which analyse and explain what a group is, how it is formed, how it evolves and how to co-ordinate it in different social fields.

The “Three P’s” model is one of the possible approaches we can use to explain what a group is:



According to this model:

- The P for **project** refers to the fundamental task of the group, the activities which bring about and motivate its existence – for example, a learning activity.

- The P for **procedure** refers to the whole of the resources, methods and instruments necessary to carry the project forward - for example, carrying out learning activities using human and material resources existing in the environment such as the learning materials and the facilitators or other experts within the institution.

- The P for **process** encompasses the network of human relationships which are established and by means of which the group applies procedures in order to carry forward the project. This process, which some people call the "**the group mechanism"** crosses all collective activity, is present in everything the group does, even to the point of determining the possibilities for the group either to take the project forward or stagnate. For example, not agreeing on the forms and channels of communication in a group can result in a communications break-down.

In the case of face-to-face learning, the individual or group "project" is generally one of the modalities proposed which constitutes a common interest shared by the group or that can be undertaken individually in order to contextualize the project content to specific working realities. As far as the "procedures" are concerned, although they are already outlined in the teaching/learning and support strategies, the application of a learner-centred approach[5] allows for modifications to the methods and instruments which might be a product of the group. That is to say, although the trainer has planned a given strategy, a **certain degree of flexibility** must be applied to meet the group and individual learning needs.

The only component which is not present from the start in group learning activities is the "process" because the network of relationships and group dynamics develop through different stages. These stages constitute clear indicators of collective behaviour and are therefore the focus of the analysis for group learning facilitation.

The group process evolves through different stages. These stages can be explained as follows:

- forming (formation/belonging to a group);
- storming (exchange of ideas/identification);
- norming (consensus building);
- performing (working together effectively and efficiently).

While the four stages are separated for analytical purposes, rather than separate phases which follow one after the other, they are situations which present themselves through the life of a group. A group can be living in a dynamic which has to do with more than one stage at the same time.

- **Forming stage:** This is the stage of getting to know each other and of individual commitment to the task or project. The initial situation is one of insecurity and prudence, with demonstrations of both active and passive attitudes, together with the aim of finding a role within the group. Respect for this role by the rest of the group gains recognition of one's presence and acceptance within the group.

  Participants overcome their initial insecurity and move on to what is called "fusion", a state of group infatuation, where there is a vivacity and sense of identification with the group

[5] See module 1

and its purpose.

- **Storming stage (exchange of ideas/identification):** The title might suggest that this stage is a period where multiple individual anxieties spring up, and indeed it is so. What happens is that the earlier infatuation breaks down and at the same time the participants remember their individual predilections They need to find them again and bring them out. Inspired by a type of realism and practicality, the participants seek a definition in clear terms of *who is who*.

In this activity the participants might be thinking:

◊ *'What do the others think of me?"*

◊ *"The girl who wrote message No 1 appears to want to do it all herself."*

◊ *"I am not sure that I have got anything in common with anybody."*

◊ *"I'm the only woman. It is going to be difficult to make the others understand my views."*

Looking back on individual characteristics, it is essential to define the influence of each one and to categorise the inputs to the group. As a result, roles are assigned to the members, for example: "the questioner, the one with his/her head in the clouds, etc."
In addition, anxieties about the trainer and his/her role arise. The group asks itself if s/he is the person who will take all the decisions or if there will be space for the group to co-decide.

- **Norming stage:** Group members search for consensus. Convergence of opinions and individual inputs takes place. Finally, individual differences are accepted and new rules for working are put together. These rules, indicating the ways of working which were handed out at the beginning of the course, or totally new ones, should be interpreted. At this point the group has finished what might be called 'pre-performance'.

- **Performing stage**: This stage can begin only when the group feels and thinks that things can be predicted, that certain rules of interrelationship are agreed upon and that the group does not need to negotiate what has already been established. This is when interest in deepening the task or getting on with measuring the achievement of the objectives appears thereby ensuring the effective and efficient performance of the task with the facilitation of the trainer.

[6]

[6] Source: ITC ILO Gallery

You might be asking yourself "What can I do to facilitate the group process?"

It is crucial to clarify that none of the above phases is bad or should be avoided: it is a process and as a trainer or 'group manager' you should be aware of them, recognize when they happen and help the group move from one phase to the next one.

Some suggestions, related to the facilitation of each phase, can be:

- **Forming stage:** The way of facilitating this group stage corresponds to what we have called the 'course induction'[7]. Your task as trainer is to create a pleasant and comfortable learning climate.

  In order to make the most of what this group stage has to offer, the trainer can seek open participation using techniques such as ice-breaking, brain-storming, short answers or answers with precise details.

  Whether the group achieves closure of this stage and is ready to move on depends to a great extent on defining every group member's role and place in the programme and ensuring that all participants are clear about the rules of the game.

- **Storming stage.** If the previous stage aims at building a safe and trusting environment, this one needs to establish differences and functions. Your role as a trainer is to create the necessary conditions so that individual differences can show up.

  In order to make the most of the outcomes which this group stage offers, relevant interventions by the trainer consist of asking the participants to provide definitions, examples, experiences, anecdotes and/or points of view.

  There are no recipes to facilitate the closure of this stage, but an important rule is that everyone has the opportunity to express their opinions. This also contributes to the

[7] See module 1

democratisation of the group and the application of equal opportunities practice. Joint reflection and collaboration should be pointed out as 'good practices' in ways of working.

- **Norming stage.** The most important need in this stage is for the group to achieve agreements. Thus, it is up to the trainer to suggest new forms of discussion or to emphasise and value consensual contributions.

This is a stage which is typically picked up at different points in the group experience. Therefore the trainer needs to pay attention to when this type of dynamic (new rules, search for consensus) is presented in order to steer it appropriately through fulfilment of the task and achievement of the objectives.

- **Performing stage.** When the group has arrived at this point, what it most seeks is a good level of achievement and ways of proving it. The interest of the group is strongly transferred to the project. Thus the work of the trainer is to concentrate on offering ways of improving task performance effectively and efficiently.

The interest of the group at this stage can be best served by giving full support to the finalisation of complex collaborative activities such as research work, proposals and projects[8].

	Definition 	What is a **group**? Conceiving of a group as a dynamic whole should include a definition of group that is based on interdependence of the members (or better, the subparts of the group). (*Kurt Lewin)* By a group we mean a number of persons who communicate with one another, often over a span of time, and who are few enough so that each person is able to communicate with all the others, not at second-hand through other people, but face-to-face. (*George Homans)*

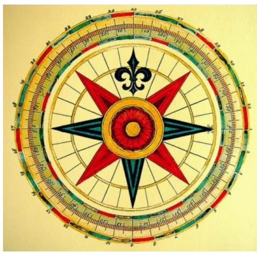
[8] Soto Cabrera L, Leibowicz J, *Facilitate face-to-face learning, Module D3*, Competency-based Training of Trainers Programme (www.itcilo.org/CBHRD), ITC ILO, Turin, 2003

		 To put it simply, groups are units composed of two or more persons who come into contact for a purpose and who consider the contact meaningful. (*Theodore M. Mills*) A group is a collection of individuals who have relations to one another that make them interdependent to some significant degree. As so defined, the term *group* refers to a class of social entities having in common the property of interdependence among their constituent members. (*Dorwin Cartwright and Alvin Zander)* Descriptively speaking, a psychological group is defined as one that is psychologically significant for the members, to which they relate themselves subjectively for social comparison and the acquisition of norms and values, ... that they privately accept membership in, and which influences their attitudes and behaviour. (*John C Turner*) A group exists when two or more people define themselves as members of it and when its existence is recognized by at least one other. (*Rupert Brown)*[9]

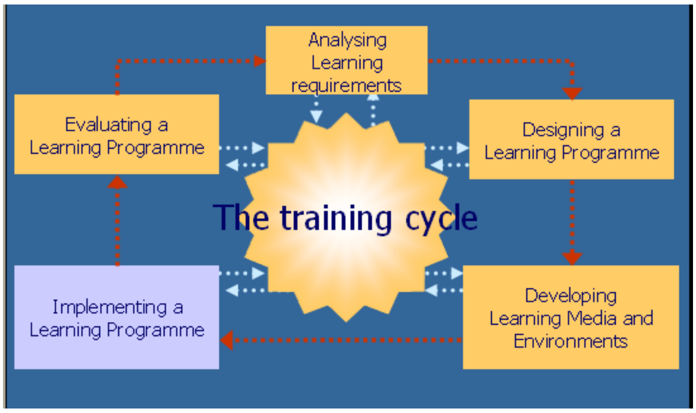
[9] Source: *The encyclopaedia of informal education*, www.infed.org

	Training pill 	*Albert Einstein said:* *I never teach my pupils; I only attempt to provide conditions in which they can learn.*

5. THE TRAINING CYCLE



Your training functions are part of a cyclic process.



As a face-to-face trainer you are acting in the 'implementation phase', but the process started long before, with an extensive **analysis of the learning requirements**.

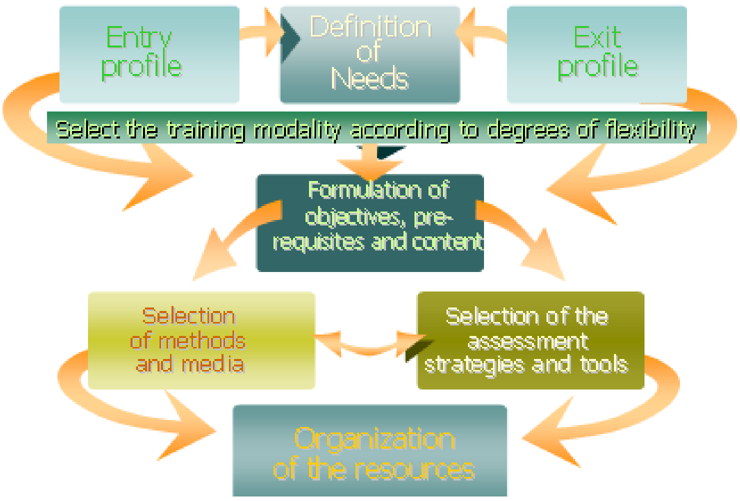
In fact, whenever there is a challenge, a difficulty or a potential that can be exploited, and such a situation can be improved through a training and learning intervention, trainers, technical experts and assessors should carefully analyze:

- The major characteristics of the people who are facing the challenge or who are part of the opportunity to be exploited;
- The learning needs of these people;
- The resources (human, material, financial) available for the design, delivery and evaluation of a training and learning initiative.

It is on the basis of the data collected during the analysis phase that trainers and designers can **design a training and learning initiative** by defining:

- The modality of the intervention: Will it be face-to-face or at a distance; group, individual or self-learning based; an awareness-raising or a training initiative; a combination of these modes?
- The pre-requisites participants have to satisfy in order to be part of the initiative;
- The general and specific learning objectives;
- The learning contents;
- The training and learning and assessment strategy: What methods and tools will be used?

- The evaluation strategy: How will the intervention, the transfer of learning to the participants' working contexts, and the impact be evaluated?



The design phase is challenging because it implies a serious decision-making process. That is why it has to be built on the solid basis of the data collected during the analysis phase. The design provides the 'shape' to the whole intervention: what is not part of it is very unlikely to happen.

Wisdom pill

If you can dream it, you can do it.

The design gives trainers, content experts and developers the necessary information to **develop the tools and materials** that will be used during the programme:

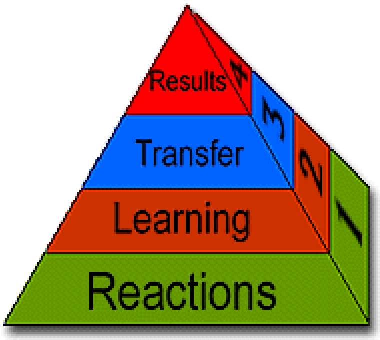
- Training manuals;
- Learning modules;
- Slides and other visual supports;
- Videos;

- CD ROMs;
- E-learning Campus;
- Web sites;
- And whatever other materials are necessary to facilitate learning, when designing the training and learning strategy of the programme.

It is only when all the training and learning materials and tools are ready that the **implementation of the programme** can start in line with the modality foreseen during the design.

It is therefore crucial that all trainers working during the delivery be aware of all aspects of the design. Only a good communications strategy within the training staff will ensure the programme's coherence and consistency.

The coherence and consistency of the programme will be **evaluated** by the participants at the end of the programme. This will be the first level evaluation, 'reactions', according to the Kirkpatrick model.[10]



'Learning' (the second level) will have to be assessed within the entire process, to ensure that participants have been sufficiently helped to 'transfer' their learning to their working contexts (third level).

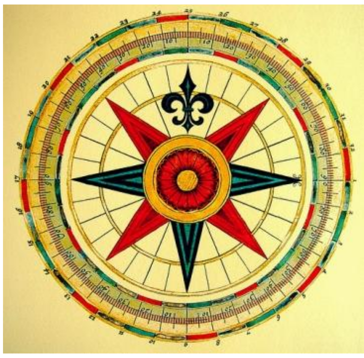
Only where learning is transferred, does an impact occur and the 'results' can be evaluated (fourth level).

Other levels can be added to the Kirkpatrick pyramid, such us the Return on Investment (ROI) (fifth level) and the Intangible Benefits (sixth level). The more we climb up the pyramid, the more expensive the evaluation process becomes in terms of human, financial resources and time.

[10] Donald Kirkpatrick is Professor Emeritus of the University of Wisconsin in North America and a past president of the American Society for Training and Development (ASTD). He is best known for creating a highly influential model for training evaluation, consisting of four levels. Kirkpatrick's ideas were first published in 1959, in a series of articles in the US Training and Development Journal but are better known from a book he published in 1975 entitled, "Evaluating Training Programs".

	Wisdom pill 	*Aristotle said…* *…We are what we repeatedly do. Excellence, then, is not an act, but a habit.*

6. THE LEARNING ASSESSMENT



Learning assessment is a form of evaluation that demands a considerable investment of time and resources[11]. This is probably why trainers do not do it systematically in their activities.

However, we consider it extremely important to dedicate the necessary time to the assessment of the learning and we strongly suggest that you ensure that learning assessment exercises are mainstreamed in your course.

Ideally, each learning process should embed:

- *a preliminary self-assessment:* which enables each participant and the trainer to become aware of the learner's initial level of knowledge and capacity;
- *formative assessment:* which provides important information on 'what' and 'how' each participant is learning, giving both the learner and the trainer the opportunity to intervene to cover possible gaps and satisfy learning needs as well as readdress the learning process;
- *summative assessment:* which provides crucial information on the level of learning achieved by each participant during the course. The results are particularly meaningful when compared to those from the preliminary assessment. The summative assessment supplies relevant information on the effectiveness of the training and indications of the need for repeating it and of possible necessary modifications.

Assessing learning is a reliable process that can tell trainers that their course managed to help participants achieve their learning objectives and produced a (positive) CHANGE in the way they perform.

Positive results related to the first level evaluation (the satisfaction of the participants) do not necessarily imply that people have learned and they have acquired new capacities.

A wide range of assessment methods can be used in training.

Some common and professionally accepted assessment techniques are:

- Questionnaire (close-ended and open-ended)
- Work simulation

[11]It corresponds to the 2° level of the Kirkpatrick model. See the 'Trainer's compass', Module 5

- Case study
- Portfolio
- Self assessment
- Project proposal
- Action plans
- Structured interviews

When selecting a suitable method for your participants and the learning objectives they are supposed to reach, you should consider a few key factors[12]:

- **What is to be assessed**: The competences or capacities to be assessed should be clearly identified.
- **Who is to be assessed**: A short profile should be developed that characterizes the candidate.
- **The assessment candidates' experience**: Individuals who have been working for several years probably have not undergone a written examination for some time. This can lead to resistance and the possibility that their performance could be affected by their lack of familiarity with the assessment methodology. This issue needs to be carefully considered and, if a traditional formal examination is selected, appropriate practice-based exercises need to be provided to the candidates.
- **How many candidates are likely to be assessed**: The financial viability of each assessment methodology is substantially influenced by the size of the programme.
- **Cost of the assessment tool**: Assessment methodologies vary in cost and the information they provide about a candidate's level of competence.

The level and the complexity of an assessment strategy depend on the design of the training. It is understandable that there will not always be the possibility of having individual interviews and /or simulations, but still the learning assessment can be designed and undertaken in a satisfactory way. Asking participants to design an action plan, for example, is a way of guaranteeing that they continuously analyze the new knowledge, skills and values acquired and contextualize them within their own realities. Action plans can be designed by groups (e.g. by organization or country/region) and revised in plenary.

In addition, there exist techniques that enable the trainer to quickly check the level of understanding and learning by the class before, during or at the end of the training. One of these is the so-called 'RARA': Recall, Adjust, Reinforce, Assess. It works as follows:

Participants cluster by group and formulate one question related to the topic dealt with the day/s before, and write it on a card.

Each question is then passed over to another group which has to answer to it (with sentences or

[12] http://www.asinc.ca/en/methods/index.html

pictures) and present its answer to the plenary for feedback.

For example, In the case below the group drew a set of pictures to provide the answer to the question:

"How to facilitate a training program?"

As its name states, this technique enables the trainer to:

- 'Recall' the contents dealt with in the past day/s of the course;
- 'Adjust' the learning when it is not correct by clarifying possible misunderstandings;
- 'Reinforce' those aspects which are key for the learning process, but have not been sufficiently taken into consideration by the participants, and
- 'Assess' the level of learning.

When preparing questions for learning assessment – and you should remind also your participants of this – remember that the formulation of the question is key. Incorrect or unclear questions lead to incorrect or unclear answers.

Wisdom pill

Einstein said…

… If I had an hour to solve a problem and my life depended on the solution, I would spend the first 55 minutes determining the proper question to ask, for once I know the proper question, I could solve the problem in less than 5 minutes.

In order to stimulate creativity and powerful thinking, the trainer should ask 'powerful questions', which can significantly improve the quality of insight, innovation and action. There are three dimensions to powerful questions: construction, scope and assumptions[13].

a. *Construction:* The linguistic construction can make a critical difference in either opening the participants' minds or narrowing the possibilities they consider. Words like "why, how, what" can make question more inspiring and powerful then words like "which" and "yes/no questions".

b. *Scope:* The scope of a question must be precise to ensure that a specific answer is provided (trainers should avoid making the scope too broad).

   e.g. How would you solve issue x *in your department*? Or

   How would you solve issue x *in your organization*? Or

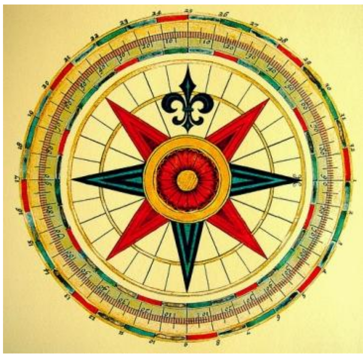
   How would you solve issue x *in your country*?

c. *Assumptions:* We often pose questions with assumptions built into them. However, assumptions can mislead a learner. For example, if we ask: "What is the error in this report?", we assume that there is a mistake and we influence the respondent who will analyze the report primarily to identify the error. If instead we ask: "What do you think about this report and what can you learn from it?", we encourage reflection and stimulate intra- and inter-collaboration[14] and learning.

[13] Brown J., Isaacs D., Vogt E., *The art of powerful questions. Catalyzing, insight, innovation and action,* USA, 2003

[14] 'Intra-collaboration' refers to the way the learner approaches the text. 'Inter-collaboration' refers to the way the learner relates with the other participants.

7. LEARNING MONITORING



Monitoring learning

'Monitoring' is a key concept in training delivery and it is directly related to learning assessment and training evaluation.

Monitoring is an activity in which the trainer observes, records and interprets information about the behaviour and performance of each of the learners and the group, in order to offer guidance to achieve the learning objectives. Monitoring comprises a constant observation of the learners. It is used by the trainer to detect support needs, and individual and collective learning difficulties.

As mentioned in the above paragraph, monitoring can refer to each person or to the group as a whole. Both types of monitoring are important to provide the necessary input for learning to take place. Let us look at the variables which are of interest to observe:

- *Attendance and punctuality:* in accordance with the agreed agenda and institutional rules.
- *Outcomes of formative assessment:* the score or grade given to pieces of evidence (or products) collected by the trainer or by the learner.
- *Asking questions:* whether the learner externalises uncertainties (during inputs or at other times) or if he/she behaves as if he/she did not have any.
- *Type of relationship with the contents:* identifying what the learner does with the course contents and how he/she is processing them.
- *Participation in group work:* identifying how each person interacts with the group.

In order to bring this information together, you can use a monitoring tool such as that shown below:

TEMPLATE FOR MONITORING INDIVIDUAL LEARNING

NAME OF PARTICIPANT:

For the graphic expert: please add a column with the title:

Participation in group work

1 TIME	2 ATTENDANCE (punctuality and frequency)		3 FORMATIVE ASSESSMENT								4 QUERIES		5 RELATIONSHIP WITH CONTENT		
			Performance evidence				Knowledge evidence								
	Yes	No	1	2	3	4	1	2	3	4	Yes	No	Self-refer	Dialogic	Reactive
Week1															
Week 2															
Week3															
Week4															

The template can be filled in as follows:

1) *Time* is a variable which can be adjusted according to the course characteristics and the trainer's possibilities of monitoring. A register can be made based on days, weeks or months. It is also possible to substitute the heading "time" with the variable "topic", "learning unit" or "course module". This is the key variable which determines the other variables to be recorded.

2) The *attendance* could be defined as a percentage of punctual attendance - for example 80% of the total sessions. The idea of recording this variable data is not to exercise control over attendance, but to detect possible motivational problems which impact

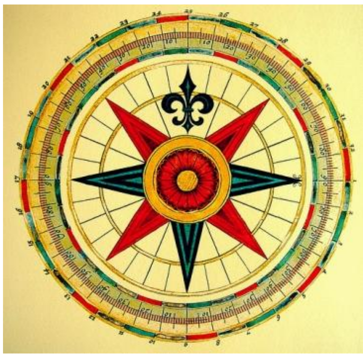
	on the person's performance. 3) The *formative assessments* column is divided into "performance evidence" and "knowledge evidence". The columns can be completed either with scores or qualitative comments assigned to each piece of evidence. In the above template, four spaces have been created for evidence/products, which must be adjusted according to the number of items required. 4) The *queries* column is designed to detect which of the learners are not expressing queries or doubts so that the trainer can approach them to see if they need help. 5) *Relationship with contents* can be classified as: ▪ *Self-referral:* the learners create a relationship between the subject matter and their own conceptual or operational mindset, and identify the relationship between what they already know and what is being learned; ▪ *Dialogic:* the learners explore the subject matter and the contents and pose questions; this is manifested by a natural desire for exchange with other participants; ▪ *Reactive:* the learners show a capacity to reformulate their own conceptual and operational frameworks to make room for new frames and paradigms based on the new information, the other participants, and overall on the resources provided in the learning environment. Generally speaking, how a learner is relating to the subject matter can be seen when the person participates in input sessions, but also through group work, and in formally-presented reports, as well as in informal comments. With this information the trainer can identify immediate support strategies, while always

	endeavouring to ensure that the learner moves from a self-referral relationship with the contents to a relationship of a reactive type. *How to process the information?* The information should be dealt with as often as possible and according to the work plan and the intensity of the planned activities. The outcome of this process is an interpretative summary of the data. Below, we suggest a list of questions to process the information collected on each participant: • Is there a relationship between the number of questions/inputs made by the participant and the quality of his/her evidence/products? • Is his/her attendance within the percentage fixed by the agenda and the institutional regulations? • Are the queries and comments he/she raises relevant to the learning objectives? • What is his/her learning style? Has he/she indicated any difficulties? What are they? • What queries, anxieties, topics or difficulties are still outstanding? • Does he/she know how to transfer the acquired knowledge and skills to his/her work? • Does he/she put new ideas into practice? • Does he/she contribute to the building of collective knowledge or simply accept what others discuss and propose?[15]

[15] J. Leibowicz; L., Soto Cabrera, *Facilitate face-to-face learning,* Module D3, Learning Unit 3, from the 'Competency-based Training of Trainers' Programme, DELTA Programme, ITCILO, Turin, 2003

	Wisdom pill  *“Learning is not a spectator sport”*

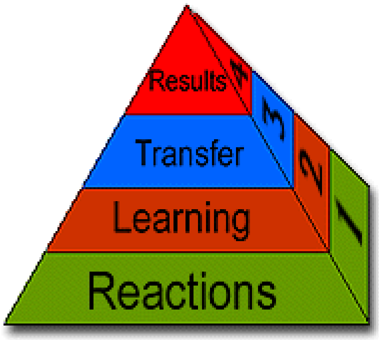
8. TRAINING EVALUATION



Training evaluation

In the 'Trainer's compass' of module 5, we introduced a brief description of the Kirkpatrick evaluation model and in module 6 discussed in depth how to assess learning (second level of the model).

Let us now focus on level 1, the evaluation of a training course o programme from the participants' point of view: the *reactions*.



This type of evaluation is probably the simplest and fastest

to carry out and this explains why it is also the most common one.

It constitutes the basis of the evaluation process and gives trainers crucial information on how to improve the cou

In fact, it enables participants to evaluate the delivery of the course in relation to aspects like:

- the learning objectives and the extent to which these have been achieved;
- the relevance of the contents in relation to the objectives;
- the quality and relevance of the training methods and media used;
- the effectiveness of the methods and media used for learning assessment and evaluation;
- the overall quality of the activity.

Although the evaluation is generally carried out at the end of the course, in order to identify modifications that m be needed in future courses, it is advisable that it also take place during the delivery of the training so that necess adjustments can be made (intermediate evaluation)[16].

Selecting the methods and instruments to be used for gathering the information depends on the type of course, t type of information that is needed, the time to be allocated to the evaluation and the system of processing the da that will be used.

The following table sets out the main methods for collecting information with the corresponding advantages and disadvantages[17]:

Method/ instrument	**Application**	**Advantages**	**Disadvantages**
Questionnaires and checklists	Obtain large quantities of information in friendly form.	▪ Anonymous. ▪ Low cost. ▪ Easy to compare and analyse. ▪ Applicable to large groups. ▪ Allows a lot of information to be obtained. ▪ There are many examples.	▪ Feedback difficult to provide. ▪ Impersonal. ▪ Not always possible to get a full overview. ▪ No exchange of opinions possible.
Interviews	Obtain complete information on an individual's impressions and experiences or deepen their responses to a questionnaire.	▪ Full and in-depth information can be obtained. ▪ Creates good relationships with people. ▪ Flexible regarding the people consulted.	▪ Takes a lot of time. ▪ Difficult to compare and analyse.
Observation	Gather accurate information on how the course is delivered.	▪ Witness the course's activities as and when they actually occur.	▪ Observed behaviour can be difficult to interpret. ▪ Observations can be difficult to categorise.

[16] Jaretti B.; Pujol J., *Evaluate the delivery of a training programme*, Module E2, Introduction, from the 'Competency-based Training of Trainers' Programme, DELTA Programme, ITCILO, Turin, 2003

[17] Adapted from McNamara C., *Basic Business Research Methods*, chapter *Brief Overview of Basic Methods to Collect Information* 1999.

			▪ Can influence the behaviour of those being observed.
Group work	Examine and deepen a specific topic or aspect of a programme	▪ Rapid and reliable way of drawing a consensus of conclusions. ▪ Can be an efficient and quick way of obtaining a wide range of in-depth information. ▪ Allows key information on the course to be obtained.	▪ The responses can be difficult to analyse. ▪ Requires a competent facilitator.

Let us consider the first method proposed above: the evaluation questionnaire. Although it presents some disadvantages, it is simple and quick to apply and enables the training staff to have a clear picture of 'how the participants felt (or are feeling)' about the training. It may contain closed-ended and open-ended questions.

The following is an example of an end-of activity questionnaire you can easily adapt to your own course.[18]

END-OF ACTIVITY EVALUATION QUESTIONNAIRE

Please give each question below a mark from 1 to 5, with 1 being the minimum and 5 the maximum.

1- not clear at all

2 - not very clear

3 - somewhat clear

4 - clear

5 - very clear

If you think that a question does not apply to you, or that you do not have the information needed to answer it, please leave it blank.

[18] The example is an adapted version of the ITCILO end-of activity evaluation questionnaire.

1. Before participating in this activity, were you clear about its objectives, contents and methods?

1 - not at all 2 - not really 3 – partly 4 – mostly 5 - fully

2. To what extent were the activity's objectives achieved?

1 - not at all 2 - not really 3 – partly 4 – mostly 5 - fully

3. Given the activity's objectives, how appropriate were the activity's content?

1 - totally inappropriate 2 - not appropriate 3 - partially appropriate 4 – appropriate

5 - very appropriate

4. Have gender issues been adequately integrated in the training?

- 1 - far too little
- 2 - not really
- 3 - partially
- 4 - mainly
- 5 – fully

5. Were the learning methods used generally appropriate?

- 1 - not at all
- 2 - not really
- 3 - partially appropriate
- 4 - appropriate
- 5 - very appropriate

6. How would you judge the resource persons' overall contribution?

- 1 - truly disappointing
- 2 - rather unsatisfactory
- 3 - roughly satisfactory
- 4 - good
- 5 – excellent

7. Did the group of participants with whom you attended the course contribute to your learning?

- 1 - not at all
- 2 - not really
- 3 - to some extent
- 4 - yes
- 5 - yes, very much so

8. Were the materials/media used during this activity appropriate?

- 1 - not at all
- 2 - not really
- 3 - to some extent
- 4 - yes
- 5 - yes, very

9. Would you say that the activity was well organized?

- 1 - not at all
- 2 - not really
- 3 - to some extent
- 4 - yes
- 5 – absolutely

10. Would you call the Secretariat efficient?

- 1 - not at all
- 2 - not really
- 3 - to some extent
- 4 - yes
- 5 – absolutely

11. How likely is it that you will apply some of what you have learned?

- 1 - very unlikely
- 2 - unlikely
- 3 - not sure
- 4 - likely
- 5 – certain

12. How likely is it that your institution/employer will benefit from your participation in the activity?

- 1 - very unlikely
- 2 - unlikely
- 3 - not sure
- 4 - likely
- 5 – certain

13. List 3 actions you are going to undertake to apply the learning gained.

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14. Are there any specific suggestions you would like to make?

	We strongly recommend to always have a *formal* evaluation within and at end of your course. Mid-term evaluation is as important as final evaluation. The various techniques and tools proposed here can be used at the end as well as during the training).[19] The data collected will enable you to improve the quality of your training. However, formal evaluation does not always tell 'all' about a course. As noted in its disadvantages, it does not allow feedback and discussion on the evaluation participants provide. Our suggestion is to combine *formal* evaluation with *informal* evaluation. At the end of a course (but also during it) participants tend to need to express and share their feelings about their learning experience. It is therefore extremely important to carve out some

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space within the course agenda to satisfy this need and to collect additional information on the participants' viewpoints about the course, which can then complement the data collected by the formal evaluation.

There are various methods that can enable informal (and pleasant) evaluation. We propose the following two, but many more can be found in the training and learning literature:

1. The spirals of learning

The shape of a 'spiral' is particularly suitable for this activity. Spirals build on a small point (existing knowledge), but can be never-ending. They are very similar to the learning process a trainer aims at creating.

In this exercise, participants are divided by groups and have at their disposal a table or a large spot on the floor. They answer the following questions individually, writing their short answers with markers on coloured cards. They should write only one answer per card (with big characters in a way that it is easily readable), and they can write as many cards as they like:

a. What did you like about this course? (yellow)

b. What is the greatest learning you gained? (orange)

c. What will you do with it? (green)

They place the cards with their answers - on the table or the floor - in a way that they form a spiral, ordering the cards by colour: first, all the yellow cards, then the orange and finally the green cards, as shown in the picture below.

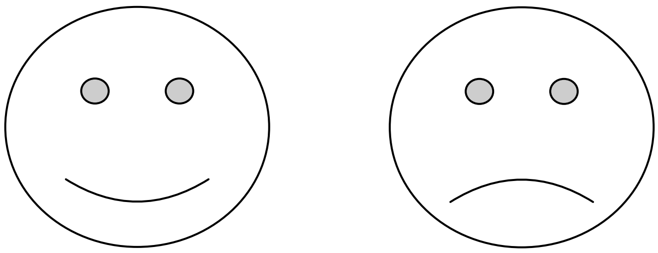
When all the groups are done, participants circulate and read the other groups' spirals.

You will probably have to write the course report: take the spiral's cards with you!

2. The smiling (or non smiling) face.

This exercise is quick and facilitates the sharing of impressions and feelings in plenary.

Prepare two sheet of paper (A4 format) with faces on them. On one sheet draw a very happy face, while on the other draw an unhappy face.



Put the two sheets on two chairs (close to each other) and ask participants to sit on the chair that most corresponds to their feeling about the course and to explain why. Someone may want to sit on the middle or on both chairs. Interesting comments will surely be made.

Remember to take notes of the various comments; they can be precious when writing the report!