Pedagogy and adult training:
A trainer's manual

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ILRI works with partners worldwide to help poor people keep their farm animals alive and productive, increase and sustain their livestock and farm productivity, and find profitable markets for their animal products. ILRI's headquarters are in Nairobi, Kenya; we have a principal campus in Addis Ababa, Ethiopia, and 14 offices in other regions of Africa and Asia. ILRI is part of the Consultative Group on International Agricultural Research (www.cgiar.org), which works to reduce hunger, poverty and environmental degradation in developing countries by generating and sharing relevant agricultural knowledge, technologies and policies.

Table of Contents

Foreword

The International Livestock Research Institute (ILRI) has a mission to support sustainable poverty eradication in livestock-dependent livelihoods. This is in line with the Consultative Group on International Agricultural Research (CGIAR) vision of reducing poverty and hunger, improving human health and nutrition, and enhancing ecosystem resilience through high-quality research, partnership and leadership.

Starting from 2010, the CGIAR has been developing and putting in place an institutional model designed to improve its delivery of research results. This new arrangement has a strategy and results framework aimed at greater efficiency and developmental impact by working through stronger and more dynamic partnerships through the impact pathway.

Capacity development is an important component of these impact pathways, and one of the ways in which ILRI relates with its stakeholders at the grassroots level. For effective delivery and utilization of information emerging from research it is useful to address the capacities of actors in an innovation system. To support this, ILRI and other CGIAR institutions have included in their mandate a wide range of capacity building activities for 'boundary partners' or 'boundary spanners', who are more effective in impact-oriented contact with their communities and other stakeholders.

This manual has been prepared for boundary partners organizing adult training forums, and is designed for teaching how to implement and evaluate such processes. The manual contains unique features developed and refined from years of implementation and feedback received during trainings held in many countries. This includes tips on how to use participatory training procedures, in which participants play active roles in the teaching and learning process, designing and using learning aids that are user friendly, and leadership teaching styles through which the trainer learns how to engage and maintain the participants' attention and articulate messages. The final product is a user-friendly handbook that is easy to read through and apply while implementing adult training sessions.

I am sure that this manual will serve as a valuable toolkit for training across different CGIAR centres and partners. It is an approach that can be used in any sector (public health, environmental management, educational systems, etc.).

Dr Carlos Seré
Director General, ILRI
21 June 2011

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We especially acknowledge the role played by participants of various training forums where the content and procedures used have been developed, delivered and refined over time, and especially the evaluation and feedback they have provided to ensure the manual serves its objective effectively.

Purvi Mehta Bhatt and Julius Nyangaga

Introduction

The world population is now over 6 billion, with a large proportion of those aged between 25 and 60 living in the less developed countries. There are about 4 billion adults in this age bracket and about half of these (1.9 billion) are engaged in agriculture. They are considered to be adult learners—recipient of some kind of extension training or educational activity aimed at older people. Training such adults requires a relatively different approach from normal school pedagogic approaches. As mature students, they present unique characteristics. These include established mind-sets that have been developed over years living in different cultural backgrounds and experiences, leading to differing and strongly held attitudes, priorities or needs which makes the training a challenge to handle. Thus there is a profound need for specific guidelines for training adults.

This manual, to be used to train adult participants, is designed with features to help overcome the challenges faced in delivering such training service. For one it promotes interactive, experience-based, practical and impact-oriented approaches based on various experiences. This involves role plays, hands-on exercises and training materials that are designed for trainers to deliver the service effectively. The course is based on case studies and shared learning from a large number of developing countries with agriculture, climate change and animal science focus.

The training manual is divided into seven sessions. Session 1 defines adult learning; Session 2 explains the principles of designing and planning of a training program; Session 3 describes the course introductory session; Session 4 elaborates on guidelines for effective teaching styles for adults; Session 5 explains the different styles involved in adult training; Session 6 describes training aids or materials that can be used to support the training; and Session 7 covers the steps to be taken to evaluate and measure the impact of an adult training course.

Each manual session has four parts to facilitate its use as a practical training guide, whereby each session can be implemented as a stand-alone course. The first part of a session gives a summarized introduction of the session. The second part contains session guide, objectives to be achieved and the training activities and requirements. The third part of each session contains slides that can be used in plenary presentation. The fourth part contains detailed notes to be used by the trainer or given out to the course participants. Each session then ends with a list of references used and recommended reading.

The preferred number of participants for any training sessions is 20–30 and the full course has been designed to take 2 to 3 days, in order to incorporate more interactive, experience sharing and participatory sessions. However, there is room for flexibility to allow coverage of the most essential content in a single day.

The manual's goal is to strengthen trainers and their faculties' capacities to design, disseminate (or conduct) and evaluate the impact of adult trainings forums and their development as 'Trainer of Trainers'.

> 'People learn what you teach them, not what you intend to teach them.'
>
> *B.F. Skinner—behaviourist, author, inventor, social philosopher and poet*

Session 1:

Adult learning—Definition and unique features

1   Introduction

This session aims at pointing out unique features about training adults that necessitates approaches that suit peculiar needs for the training sessions to be successful. The session starts by defining what is meant by adult training, followed by the unique characteristics of adults that a trainer should keep in mind as s/he prepares and implements a training session and what differences exist in training young people (pedagogy) and adults (andragogy).

2   Session guide

Objectives

At the end of this session the trainer will be able to:

- Define adult learning
- Identify unique challenges of training adults
- Identify key principles of adult learning

Training activities

Activity	Detail	Time
Exercise	Trainer leads participants in discussions to describing an adult learner	20 mins
Plenary presentation	Trainer makes a PowerPoint presentation on the definitions of an adult learner	10 mins
Group exercise	Participants share unique challenges of training adults in four groups	15 mins
Break		
Plenary presentation	Trainer leads participants in discussing answers to the group exercise	30 mins
Handouts and reference materials		

Training materials

Flip chart, meta-cards, whiteboard, assorted marker pens

3   Session presentation

Session 1: Adult learning —
definition and unique features

Session objectives

To define adult learning

To identify unique challenges of training adults

To identify key principles of adult learning

Session sub-sessions

1.1 Defining adult learning

1.2 Characteristics of adult learners to keep in mind

1.3 Key principles of adult learning

1.4 Andragogy and pedagogy

1.1   Adult learning—definition

'... is an intervention into the ordinary
business of life—an intervention whose
immediate goal is change, in knowledge or
in competence.

'An adult educator is one, essentially, who is
skilled at making such interventions'.

Courtney, S. (1989). Handbook of Adult and Continuing Education

1.2 Characteristics of adult learners to keep in mind

Adults are *autonomous* and *self-directed*

... have a foundation of *life experiences* and *knowledge*

... are *goal-oriented*

... are *relevancy-oriented*. They must see a reason for learning something

... are practical, focusing on aspects most useful to their work

.... need to be shown *respect*

1.3 Key principles of adult learning

Takes the mode of active learning

Requires critical and reflective thinking, shared visioning

Involves simulations through team learning, case studies, role playing etc.

Requires the interpretation, practice, adaptation, and integration in to the (interests of) the trainees

Provides an opportunity for experiential learning, i.e. creative thinking, improvisation in courses etc.

1.4 Andragogy and pedagogy

Pedagogy... used for education of children

Andragogy... the art and science of helping adults to learn

1.4 Andragogy and Pedagogy—key differences

Feature	Pedagogy	Andragogy
Self concept	Dependence	Independence/ self Direction
Organization Design	Bureaucratic	Reduced hierarchy, team based high performance
Level of skepticism towards the instructor	Low	High
Purpose of intervention	orientation, instruction acquisition of knowledge	change, development, up-grading knowledge
Evaluation of the process	One sided (testing the student)	Two Way Process (evaluating the process and the trainer)

1.4 Supporting adult learning — four critical elements

Motivation — course topic should be of relevance to their day-to-day work; clear on how they will benefit from it

Reinforcement — correcting wrong and reinforcing or encouraging correct participant behaviour

Retention — assisting the learner in retaining and using the information. Support understanding, interpretation and application

Transference — ability to transfer the learned skills to their local contexts

Adult learning sensitive to...

Culture — language, society norms, colour...

Leadership, coaching style — leader and led, mentor-mentee relationships

Space — seating and moving arrangements

Time — provided for interactions and experience-sharing

Teaching material used — adequacy, appropriateness

4   Session notes

1.1   Defining adult learning

In the *Handbook of Adult and Continuing Education* (Kassworm et al. 2010) Courtney S defines 'Adult Education' as an intervention into the ordinary business of life; an intervention whose immediate goal is change in knowledge or in competence. An adult educator is one, essentially, who is skilled at making such interventions.

According to the Oxford dictionary, an adult is a person that is fully grown or developed. And according to Corder (2002) adults may have most of the following characteristics:

- They are above the age of compulsory education
- They have some experience of life and the world of work
- They have family responsibilities
- They have domestic responsibilities
- They are reasonably independent
- They are able to make their own judgements about the world around them

In contrast to children and teens, adults have special needs and requirements as learners. To be an effective adult trainer therefore one requires a good understanding on how they learn best. It might come as a surprise to a lot of people but, adult learning is a relatively new area of study.

1.2   Characteristics of adult learners to keep in mind

- Adults are *autonomous* and *self-directed.* They need to be free to direct themselves. Their teachers must actively involve adult participants in the learning process and serve as facilitators for them. Specifically, they must get participants' perspectives about what topics to cover and let them work on projects that reflect their interests. They should allow the participants to assume responsibility for presentations and group leadership. They have to be sure to act as facilitators, guiding participants to their own knowledge rather than supplying them with facts. Finally, they must show participants how the class will help them reach their goals (e.g. via a personal goals sheet).
- Adults have accumulated a foundation of *life experiences* and *knowledge* that may include work-related activities, family responsibilities, and previous education. They need to connect learning to this knowledge/experience base. To help them do so, trainers should draw out participants' experience and knowledge which is relevant to the topic. They must relate theories and concepts to the participants and recognize the value of experience in learning.
- Adults are *goal-oriented*. Upon enrolling in a course, they usually know what they want to attain. They, therefore, appreciate an educational program that is organized and has clearly defined elements. Trainers must show participants how a course will help them attain their goals. This elaboration of training goals and objectives must be done early in the course.
- Adults are *relevancy-oriented*. They must see a reason for learning something. Learning has to be applicable to their work or other responsibilities to be of value to them. Therefore, instructors must identify objectives (see Module/Session3) for adult participants when the course begins. This means, also, that theories and concepts presented must be related to settings familiar to participants. This need can be fulfilled by letting participants choose projects and examples that reflect their own interests.

- Adults are *practical*, focusing on the aspects of a lesson most useful to them in their work. They may not be interested in knowledge for its own sake. The instructors must tell participants explicitly how the lesson will be useful to them on the job.
- As do all learners, adults need to be shown *respect*. Instructors must acknowledge the wealth of experiences that adult participants bring to the classroom. Adults should be treated as equals in experience and knowledge and allowed to voice their opinions freely in class.

1.3   Key principles of adult learning

- Takes the mode of active learning
- Requires critical and reflective thinking, shared visioning
- Involves simulations through team learning, case studies, role playing etc.
- It can acquire the form of on the job experience
- Disseminates new information
- Requires the interpretation, practice, adaptation, and integration into the (interests of) the trainees involved
- It provides an opportunity for experiential learning such as creative thinking, improvisation in courses etc.

1.4   Andragogy and pedagogy

There is a difference between teaching children and teaching adults, technically referred to as 'pedagogy' and 'andragogy', respectively. **Pedagogy is** a term used for child-centred process/strategy of teaching. **Andragogy** in contrast, is the art and science of helping adults learn; the term defines an alternative to pedagogy and refers to learner-focused education for people of all ages. The following table summarizes the basic differences between traditional andragogy (Figure 1) and pedagogy (Figure 2).

Figure 1. *Andragogy: adult training.*

Figure 2. *Pedagogy: a class for children.*

Table 1. *Differences between pedagogy and andragogy*

Features	Pedagogy	Andragogy
Self concept	Dependence	Independence/ self-direction
		Adult learners have a different approach to learning. By the time you reach adulthood, you're most likely responsible for your own success and you're perfectly capable of making your own decisions once you have the information you need
Organization design	Bureaucracy	Reduced hierarchy, team-based, high performance
Organization goals	Slow-changing, highly structured	Fast-changing, dynamic
Organization climate	Authority-oriented, formal/closed competitive	Respect-oriented, informal/open, collaborative
		Adults learn best when learning is focused on them, not the teacher
Preconceived notions about the topic	Rare; does not matter	Very high; matters a lot
Background (age, level of understanding, culture)	Almost similar	Can be highly diverse
Level of scepticism towards the instructor	Low	High
Purpose of intervention	Orientation, instruction, acquisition of knowledge	Change, development, upgrading knowledge
Evaluation of the process	One sided (testing the student)	Two-way process (evaluating the process and the trainer)

Source: Whitmyer (1999).

Learning is a continuous process. However, people learn at different speeds and a facilitator should keep that in mind while conducting a training course. Often we can understand or remember things better when we have seen a demonstration or read about an application of what is being taught. This is because learning results from stimulation of the senses. It is the facilitator's task to stimulate as many senses as possible to encourage learning.

1.5   Critical elements of adult learning

To support learning in adult training there are four critical elements of learning that should be addressed:

1. Motivation—What motivates adult learners? The course topic should be of relevance to their day-to-day work and should be clear on how they will benefit from it. Typical motivations include a requirement for competence for licensing, an expected (or realized) promotion, job enrichment, a need to maintain old skills or learn new ones, a need to adapt to job changes, or the need to learn in order to comply with company directives.

   The most appropriate way to motivate adult learners is to enhance their reasons for enrolling and decrease the barriers to engagement with the learning process. Instructors must learn why their students are enrolled (their motivation). Then they have to discover what keeps them away from learning. Then the instructors must develop and plan their motivating strategies. A successful strategy includes showing adult learners the relationship between training and a particular motivation, e.g. an expected promotion.

If the participant does not recognize the need for the information shared during training (or feels offended or intimidated) then the instructor's effort to assist the participant to learn will be in vain. The instructor must establish rapport with participants and prepare them for learning; this provides motivation. Instructors can motivate students via several means:

Set a feeling or tone for the lesson. Instructors should try to establish a friendly, open atmosphere that shows the participants that they will learn.

- Set an appropriate level of concern. The level of tension must be adjusted to meet the level of importance of the objective. If the material has a high level of importance, a higher level of tension/stress should be established in the class. However, people learn best under low to moderate stress; if the stress is too high, it becomes a barrier to learning.
- Set an appropriate level of difficulty. The degree of difficulty should be set high enough to challenge participants but not so high that they become frustrated by information overload (Figure 3). The instruction should predict and reward participation, culminating in success.

Figure 3. *Adult students keenly follow explanations of a trainer.*

2. Reinforcement—correcting wrong behaviour and reinforcing or encouraging correct participant behaviour. Reinforcement is a very essential part of the teaching/learning process; through it, instructors establish appropriate modes of behaviour and performance. Reinforcement should be part of the teaching–learning process to encourage and sustain correct behaviour. Instructors need to use it on a frequent and regular basis early in the process to help the students retain what they have learned. Then, they should use it.
3. Retention—be clear on the objectives of the training course (purpose of the information). Students need to retain information from classes in order to benefit from the learning. The instructors' jobs are not finished until they have assisted the learner in retaining and using the information. In order for participants to retain the information taught, they must see a meaning or purpose for that information. They must also understand and be able to interpret and apply the information. This understanding includes their ability to assign the correct degree of importance to the material. The amount of retention will also be directly affected by the degree of original learning. If the participants did not learn the material well initially, they may not retain it well later.

Retention by the participants is also directly affected by their amount of practical application during the learning sessions. After the students demonstrate correct (desired) performance, they should be urged to practice to maintain the knowledge and use. Repeated practice is similar in effect to intermittent reinforcement.

4. Transference—the participants need to be able to transfer the learned skills to their local contexts. Transfer of learning is the ability to apply the information taught in a course in a new setting. As with reinforcement, there are two types of transfer: *positive* and *negative*.

   - Positive transference, like positive reinforcement, occurs when the participants use what they have been taught in the course.
   - Negative transference, again like negative reinforcement, occurs when the participants do not do what they are told not to do. This results in a positive (desired) outcome.

Transference is most likely to occur in the following situations:

- *Association*—participants can associate the new information with something that they already know.
- *Similarity*—the information is similar to material that participants already know; that is, it revisits a logical framework or pattern.
- *Degree of original learning*—participant's degree of original learning was high.
- *Critical attribute element*—the information learned contains elements that are extremely beneficial (critical) on the job.

Adult learning is sensitive to:

- culture (sensitivity to language, colour, …)
- leadership/coaching style (trainee's gender, trainer's gender)
- spsace sensitivities (seating arrangements)
- time provided for interactions and experiences-sharing (adult are reluctant, hence need more time to respond)
- types of teaching material used.

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Session 2:

Designing and planning training courses for adults

1   Introduction

Content to be used to train and the time allowed for the training are crucial factors when training adults. This session guides trainers on how to determine the content to be used, how to design an implementation program that will be adequate for the time provided.

The most fundamental step in developing a course for adult classes is developing the content that will be shared during the training. Advance preparation and planning will help the training course run smoothly and improve outcomes aimed at satisfying both the facilitators and the participants. The challenges lie in developing course content that will address participant needs and capacities, adequately use the time available for the course, and satisfy the diversity in levels of knowledge among the participants. Allocation of the training content along the training period should be done in ways that will engage the participants long enough to satisfy their knowledge needs, without the urgency of trying to cover too much in a short time. The course should also not be so long that participants get distracted by external interests. Logistical constraints also limit how long an adult course should take, the number of participants that can participate and the resources that will be used to support the training. This session covers related aspects that a trainer should be aware of developing content and designing the course.

2   Session guide

Objectives

At the end of this session the trainer will be able to:

- Develop relevant content for a course
- Design a training plan that will adequately cover the identified content

Training activities

Activity	Detail	Time
Exercise	Trainer will lead participants in identifying key ingredients of training course	20 mins
Plenary presentation	Participatory content development/planning for training	15 mins
Group exercise	Participants design a training plan in four groups	20 mins
Plenary presentation	Trainer leads participants in discussing the merits and Demerits of the various plans	30 mins
Break	Health break	15 mins
Handouts and reference materials		

Training materials

Flip charts; marker pens; meta-cards; manila papers; projector

3 Session presentation

Session 2: Designing and planning
training courses for adults

Session objectives

Develop relevant content for a course

Design a training plan that will adequately cover the
identified content

Session sub-sessions

2.1 Content development

2.2 Course length and design

2.3 Participant selection

2.4 Facilitator selection

2.5 Logistics—budget and costs

Session sub-sessions *(cont.d)*

2.6 Materials and equipment

2.7 Location and training venue

2.1 Content development

Sources of content:

Advance consultation: ...

Participatory planning: ....

Capacity needs assessment: ....
Use of participant questionnaire

2.2 Course length and design

Content distribution

Time—10 days is optimum

Possible class lay-outs:

2.3 Participant selection

Number affects satisfactory interaction with trainees to support understanding and practical uptake of content

Recommended to have a maximum of 15 to 20 participants

2.4   Facilitator selection

One trainer to manage 15–20 participants

Two or three trainers, with different styles, help to keep the training lively and interesting

2.7   Location and training venue

Easily accessible

Comfortable and away from distractions (home, office)

Spacious, easy to move and re-arrange chairs and tables

4   Session notes

There are several sources of training content:

1.   Advance consultation

- The first step in preparing for training is to understand the overall objective. There is often a reason that a particular training is proposed at a certain time in a specific area. It may be a part of a program's objective, or reaction by government agencies, international donors, NGOs, or other stakeholders to improve participants' capacities in areas of interest. Training objectives should be clearly defined before preparation for the training proceeds, reinforced by participant's expectations (see Session 3: The course introductory session).
- Preparations for a training course will vary in different regions because of differences in governance and culture. In some areas, close coordination with government agencies will be essential while in others this may not be as important. Other issues of local culture, including providing time during the day for activities such as daily prayer or having specific kinds of foods available, should also be taken into account. The planners should be fully aware of these issues and involve a number of local stakeholders in the planning process. Any training reports that have been written for the region should be reviewed by planners and facilitators in advance of the training. This may provide insight to local issues that may arise during the training and prevent the repeat of previous mistakes.
- Key decision-makers must be aware of the training being proposed and fully briefed on the principles, benefits and weaknesses of the course content. Ideally a meeting or workshop should be held to reach consensus on how the training will benefit the program and participants. Buy-in from key decision-makers helps ensure sustainability and financial support for future trainings and related activities. Decision-makers should be involved in planning the training program to the extent that is appropriate for the circumstances.
- Timing is an essential factor to be considered when determining content. Some curricula are relatively fixed on how long it should take to cover the training content. Some are flexible allowing for addition or removal of material to fit into days that can be available. The trainer should confirm the course's duration and work to change the training content (removing or merging, or splitting and expanding course activities) to suit the period provided.

2.   Participatory planning

- As with all development processes, power relations have an enormous impact on curriculum development, which may be dominated by one group or individual, particularly where curriculum development is centralized.
- Participatory training techniques require trainees to be responsible for their own learning and invest time and effort into determining what the training should cover (Figure 4).
- Some of the advantages gained through participatory curriculum development include the following:
    - the likelihood of domination of processes and outcomes by a small, unrepresentative group is avoided
    - different views on learning outcomes and processes may be contributed and form the basis for an ongoing, reflective dialogue

Figure 4. *An adult student demonstrates what he has learnt while others watch. Participatory learning is more effective with adult students.*

- through the training, individuals are able to build their own knowledge, and share their knowledge and experience with others
- participation is active and involves different people practising or learning by doing, which in itself promotes further learning
- as well as learning through knowledge and practice, different stakeholders hold different values, attitudes and beliefs; these may be better understood and taken into consideration through an ongoing, open dialogue
- contextualized teaching and learning becomes more feasible, since a PCD (participatory curriculum development) approach will inevitably be context dependant, and will involve those who know their own situation best
- at the same time, those with different forms and sources of expertise may still make a contribution where knowledge and skill gaps exist, and strategies may be developed to address such gaps.

3.   Capacity needs assessment

- Planners and trainers should determine if there is truly a need for the training course and if other groups or organizations that can provide the same service already exist in the area. One approach would be to assess the current capacity of the participants.
- Course facilitators should become familiar with the background of the trainees in advance of the training, if possible. Having this insight will help guide program and session planning and determine the depth to which certain topics may be explored.
- Capacity assessments helps determine which area of training should take most focus and which can be done away with. It can also help inform who is best placed to provide the training and what they will need to carry that out.

- Capacity needs assessment can be carried out in a simple way in a plenary setting or though a survey using a questionnaire. The following steps are crucial:
  - Arrange to obtain responses from the same category of potential trainees, i.e. group the trainees into similar backgrounds
  - Given the intended objective or direction (of the project), what is the most important aspect for each group and why?
  - What training (or aspect of their role) do they need to be able to carry out their functions effectively?
  - Analyse the responses into topics and use them to identify who should train the trainees in what area?
- In more technical settings, a participant questionnaire may be administered before or on the first day of training to gain more specific insight into their knowledge and experience (see Annex 1: Participant questionnaire) and facilitators will quickly learn about the personalities and knowledge of the individuals as the training progresses.

2.2   Previous experience as a source of content

- The training course content and objectives can also be based on participants' previous knowledge and experience following a survey. This involves asking participants to take 10–15 minutes to fill out the questionnaire on a few questions (see Annex 2: Questionnaire: Previous training experience). It would be more effective if targeted participants carried out this survey in advance of the course content development and design. In other circumstances, the survey can be done during the course of the training and the answers reviewed by the facilitators during lunch breaks or at the end of the day to provide a sense of the starting point of each of the participants.
- Although the in-class discussion will give some idea of the background of the participants the surveys are useful for knowing about participants who are not dominant speakers. These individuals may need special guidance during the course.

Designing a training course for adults can be said to follow four principle steps, as shown in Figure 5.

Figure 5. *Adult learning sequence principles.*

2.3   Course length and design

1. Content distribution
   - Considerations, however, such as the availability of participants and the program budget should be taken into account.
   - Participatory training methods are recognized to be extremely effective, especially for adult education, but they also take a significant amount of time. Enough time should be allotted for participants to practice with guidance.
   - In addition to the overall length of the program, facilitators and planners should also decide if the training will be continuous or include a break. How long should this break be?
   - Factors such as distance travelled and time spent away from family and regular work duties should be taken into consideration.
2. Class lay-outs
   - The seating arrangement during the training can affect the level of communication and participation. A strict arrangement of tables and chairs may be desirable during a formal opening or closing ceremony but for the majority of the training, tables can be arranged in fishbone structure or banquet set up (Figure 6).

Figure 6. *Fishbone structure and banquet set ups.*

Chambers (2002) explains the uses of the different seating arrangements as follows:

- The fishbone structure has tables rotated through 90 degrees. It is more participatory and table/group centred. It is easy to do group work, but some participants may have to turn their chairs (away from) the trainer.
- Banquet seating puts even more emphasis on groups. It allows for decentred cross conversations between people at different tables better than the fishbone and can leave a useful centre space. Even more participatory is to remove the head table except that if you use PowerPoint presentation you will still need a small table and a screen.

Often we prefer to remove the tables so that there are no physical barriers between trainer and participants.

2.3   Participant selection

- The number of participants in any course is important since it affects the extent to which a trainer can satisfactorily interact with trainees to support understanding and practical appreciation of the course content. Having too many participants reduces the trainer–trainee direct relationship and can frustrate slow learners or situations where the content is relatively new and unfamiliar.
- There should be a discussion on the selection criteria for the trainees and the optimum number of participants for a course. There should be consensus on who will make the final selection of participants.

- It is recommended to have a maximum of 15–20 participants but the program budget may limit this. Having a larger group causes certain individuals to be reluctant to participate and a larger group will limit the effectiveness of the training.
- Participants to be selected should ideally be familiar with fieldwork and can use the techniques in their daily activities.

2.4   Facilitator selection

- Although it is possible for one trainer to manage 15–20 participants, having two trainers, especially if they have different training styles, can help to keep the training lively and interesting for the participants. If possible, a third person working to handle administration and logistics, especially those related to field practice, computing and projecting, payments of per diem, and meals and accommodation, will help the program run smoothly.
- Local facilitators are ideal so that they are familiar with the language and culture of the area. If there are no local facilitators trained and available outside facilitators should be used but it must be determined in advance if translation will be required.

2.5   Logistics—budget and costs

- Many of the details of the training course will be determined based on the available budget. This includes broad categories such as the number of participants and the length of the training program but also specific details such as the venue, refreshments, transportation, accommodation and materials and equipment.
- Formal invitations to the training should be sent in good time and include objectives, agenda, and venue for the training. A request should be made to RSVP the training so that replacement participants can be invited in case of any regrets.

2.6   Materials and equipment

A training course does not require specialized equipment. Basic requirements include:

- Flipcharts, marker pens and masking tape
- Overhead or LDC projector with laptop (depends on venue and facilitators preference)
- Index cards (preferably in a variety of colours)
- Counters and bags to hold them
- Handouts
- Notebooks, binders, staplers, and pens
- Certificates for trainees (after completing the refresher course)

Optional:

- CD-rom or USB stick with training materials
- GPS units
- Sampling, field diagnostic, and personal protective equipment
- Live animals for sample collection

2.7   Location and training venue

- The training should be held in an easily accessible area for resident or commuting participants.
- The training venue should be comfortable and away from distractions such as participants' offices or government headquarters.

- The training centre should be well-equipped with a flexible room so that chairs and tables can be moved around and participants can spread out for group practice sessions. There should be blackboards or whiteboards, flipcharts, projectors and plenty of wall space to display ground rules, expectations and fears and various examples of other Participatory Epidemiology tools as they emerge during the training.

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Session 3:
The course introductory session

1   Introduction

The importance of this session lies in being the first time the trainer and trainees get to meet for the course. This first session's effective management is important since it establishes the mood and environment of the course. It is during this session that trainers and participants get to know each other, their backgrounds and interests and what the course is supposed to deliver and how this will contribute to their expectations. It is also during this session that the training community establishes rules of engagement that are sensitive to their background needs and cultural values.

2   Session guide

Objectives

At the end of this session the trainer will be able to:

- Prepare a detailed course plan
- Identify effective participatory training processes that will involve trainees and respect their cultural backgrounds

Training activities

Activity	Detail	Time
Group exercise	Give each participant a piece of paper and a marker and ask them to write their names on the top and to finish the statement, 'I am…' using six different endings.	20 mins
	Ask the participants to attach their papers to their chests with masking tapes and then walk around the room and read each other's statement.	
	Suggest that participants spend at least 30 seconds talking with one another.	
	When the exercise is over the 'I am' sheets can be taped to the wall as a 'group gallery'	
Plenary presentation	Introducing participants/course objectives	15 mins

Handouts and reference materials

Training materials

Flip charts; marker pens; meta-cards; manila papers; projector

3 Session presentation

Session 3:
The course introductory session

Session objectives

Prepare a detailed course plan

Identify effective participatory training processes that will involve trainees and respect their cultural backgrounds

Session sub-sessions

3.1 Course opening

3.2 Introducing course participants

3.3 Course objectives and course plan

3.4 Addressing participant fears

3.5 Course and session designs

3.6 Setting course ground rules

3.2   Introducing course participants

If participants are few … allow 2 – 3 minutes per participant + interesting ice-breaker approaches

If participants are more
    … just mention of name and affiliation

    … introductions can be done in smaller groups

Name badges for everybody helps identification beyond initial session

3.2   Introducing course participants
(cont.d)

Introducing the faculty:
The trainer (and his/her assistants) in greater detail than the participants.

- Adult trainees like to know who is training them

-How adequate they are for the task: skills and experiences

3.6   Setting course ground rules

Rules = terms of engagement during the course;

- ... developed by the participants

- Example of ground rules:
    -Mobile phones turned off or on 'silent' mode
    -Raise hand before speaking
    -Respect others' opinions
    -Participate
    -Sessions start and finish on time

-Participants may develop light 'penalties'

4   Session notes

3.1   Course opening

- The opening of a training course can be conducted in a formal or informal manner. If formal officials have been invited to open a training course, government protocol is usually appropriate. In many communities, some of the participants have interest in opening the training with prayers. This is a religious matter and its value should not be underrated even if people belong to different denominations. Allow whoever wishes to pray to do so but in ways that do not interfere with the other participants religious leanings.
- Typically, the course opening session can involve formal seating arrangements and a speech by one or more senior officials or invited guests. After such an official opening, it may be necessary to reorganize the meeting room into a more informal arrangement that is better suited to a participative training environment. Seating patterns should be organized to maximize communication amongst participants and trainers.

3.2   Introducing course participants

- During the opening session for adult training courses it is important to give participants a chance to introduce themselves so that by the end of the activity the participants have an idea of fellow participants. The most important information is the participants' names, the organization affiliations they represent or resident communities.
- There are very many ways introductions can be done and the approach to be employed will strictly depend on the time available and the number of participants. Introductions that take too long can be boring and sap the starting energy of the course. When participants are few and there is enough time to allow 2–3 minutes per participant, interesting ice-breaker approaches can be used (See Box 1) to help establish a relaxed and cordial mood for the course. If the participants are more and it may take too much training time, just mention of name and organization or home affiliation is enough. If time is too limiting, introductions can be done among smaller groups, provided arrangements are made for groups' re-distribution and re-introductions during the course of the course.
- Introducing the faculty: The trainer (and his/her assistants) should be introduced or introduce themselves in greater detail than the participants. Adult trainees usually need to know who is training them and how adequate they are for the task based on their skills and experiences.
- Name badges: Whichever introduction method is used name badges for everybody are essential in helping participants to continue knowing and reminding each other about who they are beyond the introduction session.

Box 1. Examples of ice-breaker introductions

Ice breakers are recommended so that participants feel comfortable and relaxed in the training environment. They are a great way for participants and trainers to get to know one another.

Example ice breakers:

1. FIND SOMEONE: Participants are given a blank index card to write three statements about themselves such as their favourite colour, hometown or hobby. They should NOT write their name on the card and the three statements should not relate to physical appearance or be otherwise obvious. Collect the cards and place them at the front of the room. Ask each participant to take a card that does not belong to them. Participants should mingle until they find the owner of the card. Once everyone has a match, the participants should introduce the owner of the card they selected.
2. BIRTHDAY PARTNER: Have participants mingle in the group and identify the person whose birth date (not year—just month and date) is closest to their own. The participants should find out two other things they have in common and introduce each other to the group.
3. NON-VERBAL INTRODUCTIONS: Divide the group into pairs. Taking turns, each member of the pair should communicate to their partner as much about themselves as they can without speaking or writing (drawing pictures is allowed). For example, they might draw a picture of their house or family. To make the exercise slightly easier, and to keep the group to time, the facilitator could call out the topics and when to changeover to the other partner. Finish the exercise by having everyone introduce their partner (verbally). Also allow the partner to make corrections and fill in missing details.

For more examples of introduction ice-breakers see 100 ways to energize groups, a publication by the International HIV/AIDS Alliance.

3.3 Course objectives and course plan

- Course objectives: The course objectives have most likely been defined among the facilitators and decision-makers before the training course began. Following the personal introductions, the broad objectives of the course and the course agenda should be discussed with the participants. The program manager or the trainer should elaborate on the background, the intentions of the course and targeted achievements. These objectives can be distributed and read out loud by the participants along with the timetable.
- Participants' expectations: For an effective participatory process, participants should also be allowed to express their interests and expectations for attending the course. This is essential because it helps inform the trainer further what gaps should be covered or which areas on interest should be given greater focus. The participants' objective will vary depending on the purpose of the training and any follow-up activities. An example list of objectives is presented in Box 2.

Box 2. Examples of objectives shared by participants attending a participatory epidemiology course

At the end of the training course, participants will be able to:

1. Describe the roles, principles and methods of participatory epidemiology (PE)
2. Plan and implement PE, including:
   a. Developing and testing a PE hypothesis
   b. Developing a PE checklist
   c. Leading a semi-structured interview
   d. Applying PE tools, including visualization and scoring techniques
3. Carry out participatory disease surveillance (PDS)
4. Record PDS findings in a format suitable for incorporation into the national surveillance system
5. Assess, analyse and report PE and PDS data
6. Design interventions suitable for disease control based on PE and PDS data

- The course objectives and participants expectations should be displayed where they will be revisited (especially towards the end of the course) to confirm if the course achieved its targets and the participants had their interests covered.

3.4 Addressing participant fears

- Participant's fears: It is important for the facilitator to also understand the fears of the participants. This helps to identify any expectations that will not be covered by the course and address misunderstandings at the beginning of the course. By being aware of the fears of the participants, the trainer can keep these concerns in mind as the training progresses.
- Developing expectations and fears: This can be done through an action activity. Each participant is given several blank index cards. On each card, the participants should be asked to write an expectation or a fear associated with the training course (i.e. what do they hope to gain from the training). If possible, use cards of one colour for expectations and another colour for fears. Encourage each participant to come up with more than one but preferably not more than three expectations and fears.
- Collect the cards and write the results on flip chart paper or tape the cards to the wall where everyone can see them (Table 2). Group the expectations into broad categories. Discuss with the participants whether each expectation will be reached in the course and how. Some expectations may be beyond the scope of the course. Also address each of the fears and discuss how they can be mitigated. The fears may also lead into a discussion of ground rules for the course; for example, a fear about not finishing on time may be addressed by creating a rule about keeping to the timetable.

Table 2. *Example expectations and fears from a participatory epidemiology (PE) training course for HPAI surveillance in Fayoum, Egypt (2009)*

Expectations	Fears
The Egyptian doctors will deliver the information to us in a good way	We will not be able to apply what is learned
Gain more experience and understand the topics	The method is not suitable for the job which I want to do
Understand how to use PDS tools	Difficulty dealing with people and exposure to HPAI virus
Know how to deal and react with outbreaks, especially those involving household keepers	Not having enough practice in PDS
Learn a new topic	The sessions will be boring and too long
To be aware of participatory surveillance	Side talking
Acquire valuable information about AI	Wasting time
Meet new people	The colleagues are pessimistic
New experience	Will not be able to apply what we have studied
Enjoy learning	What we learn is far from the field that I want to join
Know the customs and traditions of other villages	Face difficulty with people when applying PDS
This method will help to protect and serve people	Face difficulties in covering remote villages
Good company	Afraid not to be able to apply what we learned
Transparency and clearness	Might not get along with the trainer
Learn about the barriers that vets face in other areas	Will not get benefits from the training

- Following the presentation of course expectations by the participants, the course plan can be reviewed. If there are expectations beyond the planned course coverage, the program manager and/or trainer should discuss with participants how the extra expectations will be covered through other processes. This is important because it will demonstrate to the participants that the course organizers are concerned about their overall interests, contributing to a greater rapport and understanding. In some cases, interests not covered by the current training session can give opportunity to develop another training forum to satisfy those interests.
- The trainers should then present the timetable, making sure that the start, end and break times are agreeable with the participants.

3.5   Course and session designs

- Course design: The detailed content of the training course will depend on the program objectives and the training needs of the participants. A variety of training methods should be used to maintain interest and promote participation and learning by the adult participants.
- Day design: Each day should start with a review of the topics that were covered on the previous day. The daily timetable will be sensitive to local norms and be flexible enough to allow for changes when deemed necessary or prudent. For example, in some rural communities, farmers can only come to a training session late in the morning after attending to their home and farm chores. In other similar settings, women participants may have to leave early to arrange for domestic related chores.
- As much time as possible should be allotted for practical (or field) work and energizers should be inserted into the program regularly and as needed.
- Session design—A well-organized trainer will make a detailed session plan. Objectives of the session should be made clear to the participants at the beginning. Each session should thereafter contain a combination of activities that include 'seeing, hearing and doing' by the participants. The session plan should be reviewed by the trainer in advance and shared with colleagues for comments.

- An example of a day's training session plan is presented in Annex 3 (An example of a day's training session).

3.6   Setting course ground rules

- It is often beneficial to establish ground rules during the first session of the training. The rules are terms of engagement during the course of the training and should be voluntarily developed by the participants.
- The participants may also want to come up with a 'penalty' for participants caught breaking agreed rules. The penalties can be some of mild 'public punishment', done in ways to introduce action and fun. Examples are a violator singing or dancing, or saying something about themselves that no one else in the room should know. Some of these penalties are ice-breakers that help break reduce formality and increase interest and cordiality for the whole group.

Box 3. Example training ground rules

1. Mobile phones turned off or on 'silent' mode
2. Ask questions
3. Raise hand before speaking
4. Respect others' opinions
5. Participate
6. Sessions start and finish on time

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Session 4:

Learning styles of adults

1   Introduction

It has been proven time and time again, that the success of any training depends upon the relationship/ rapport between the leader–trainer and his team members. The bedrock of this relationship—as in any relationship—is effective communication and understanding of each other. Unfortunately, it has been observed that quite often, the trainer's perception of his effectiveness as a trainer is at a variance with the trainee's perception. All trainers try very hard to provide a good leadership to their teams to achieve the organizational goals. Then why are some considered effective and some are not? This session will try to answer some of these questions.

2   Session guide

Objectives

At the end of this session the trainer will be able to:

• Identify effective adult learning training styles
• Identify the different categories of adult learners

Training activities

Activity	Detail	Time
Group exercise	Ask the participants to sit in a circle. Give each person a long sheet of paper and ask them to draw a small picture on the top and their name at the bottom.	20 mins
	Ask them to pass the paper to the person on their right.	
	The second person writes a description of what they see in the drawing and fold the paper in such a way that only the written explanation can be seen. The paper is then passed to the next person on their right.	
	The person who now has the paper does another drawing according to the written description and hands the paper on to the person on their right, this time in such a way that only the drawing is seen.	
	The next person writes an explanation of the drawing in words and then folds the paper so that only the words can be seen and passes it on, and so on. The game continues until every player gets his own paper back.	
	The participants open the papers and inspect the pieces of art together.	
Plenary presentation	Trainer uses the exercise to demonstrate the difficulty in mixing visual and written methods of communication.	30 mins
	Trainer makes presentation on learning styles	
Handouts and reference materials		

Training materials

Flip charts; marker pens; meta-cards; manila papers; projector

3   Session presentation

Session 4:
Learning styles of adults

Session objectives

      Identify effective adult learning training styles

      Identify the different categories of adult learners

Session sub-sessions

    4.1   Different reasons of learning

    4.2   Different levels of learning

    4.3   Key learning profiles of an adult trainee

    4.4   Learning styles

4.1   Different reasons of learning

Social relationships: to make new friends, to meet a need for associations and friendships.

External expectations: to comply with instructions; fulfil the expectations or recommendations of authority.

Social welfare: to improve ability to serve mankind, prepare for service to the community; improve ability to participate in community work.

4.1   Different reasons of learning *(cont.d)*

Personal advancement: to achieve higher job status, secure professional advancement; stay abreast/ahead of competitors.

Escape/Stimulation: to relieve boredom, provide a break in home or work routine.

Cognitive interest: to learn for the sake of learning, seek knowledge for its own sake; satisfy an inquiring mind.

4.3   Key learning profiles of an adult trainee

Factors that impact on the learner's profile

- Style and attitudes of the learner

- Level of understanding of the subject

- The reason for being a learner

4.4   Key learning profiles of an adult trainee

Learning styles: ...

Active learner

Reflective learner

Theorizing learner

Experimental learner

Knowing the participants learning styles helps a trainer know how to engage with each one of them

4 Session notes

4.1 Different reasons of learning

- Social relationships: to make new friends, to meet a need for associations and friendships.
- External expectations: to comply with instructions from someone else; to fulfil the expectations or recommendations of someone with formal authority.
- Social welfare: to improve ability to serve mankind, prepare for service to the community, and improve ability to participate in community work.
- Personal advancement: to achieve higher status in a job, secure professional advancement, and stay abreast of competitors.
- Escape/stimulation: to relieve boredom, provide a break in the routine of home or work, and provide a contrast to other exacting details of life.
- Cognitive interest: to learn for the sake of learning, seek knowledge for its own sake, and to satisfy an inquiring mind.

Figure 7. *An adult class next to a farm. Mix adult lessons with concerns how information serves their social well-being.*

4.2 Different levels of learning

- One very important factor in adult learning is **the level of knowledge**. The audience might comprise of people who have been working in this field for many years and already know the subject very well or on the contrary you may find some who are completely new to the subject. As a result, your teaching style as a leader will have to differ according to the level of the audience.
- Let's take an example of two waiters, one who has been working in hotel industry for seven years and the other one who has recently joined and has no experience of the hotel industry. As a trainer your style will have to change. You cannot tell the waiter with the experience 'this is how you hold a glass', 'this is how you put a table cloth'—this person will feel bad about it, and even feel insulted. But with the other person, who has recently joined who is new to this field—you will have to explain every detail.

4.3   Key learning profiles of an adult trainee

The following factors impact the learner's profile in an adult learning exercise

- Style and attitudes of a learner
- Level of understanding of the subject
- The reason for being a learner

4.4   Learning styles

> 'Tell me, and I will forget. Show me, and I may remember. Involve me, and I will understand.'
>
> *Confucius around 450 BC*

- Corresponding to the styles of trainers mentioned there are different categories of learners. This is even more evident in adult training because of the participants' differences in regions, backgrounds, ages, gender, languages, different attention level, attitudes
- Depending on the type of trainees there are the following types of learners:
  - *Active learner*—Activists involve themselves fully in the learning process without bias in new experiences. They tend to act first and consider the consequences afterwards ('jump in and do it immediately')
  - *Reflective learner*—Reflectors like to stand back to ponder experiences and observe them from many different perspectives. Their philosophy is to be cautious ('wait and see and then try it')
  - *Theorizing learner*—Theorists adapt and integrate observations into complex but logically sound theories. They assimilate disparate facts into coherent theories. They are more concerned about the basic principles and expect the trainer to proceed systematically ('point by point; by the book').
  - *Experimental learner*—Experimental learners are pragmatists keen on trying out ideas, theories and techniques to see if they work in practice ('do not believe in it until I have tried it').
- Knowing the participants learning styles helps a trainer know how to engage with each one of them and how to work with them to develop the course to satisfy objectives and support the other participants.
- However, a mixed group consists of different people representing different learning styles can be a challenge for a trainer. Each type of learner will have different expectation and the trainer needs to know how to cater for them all (see Table 3).
- Some suggestions:
  - Try and know your trainee as much as possible
  - Keep changing your style to cater to as many learning styles as possible (example—if you are teaching theoretical—the theorizing person will like it—but the others may find it quite irrelevant—keep switching your style)—this is known as situation leadership
  - Keep reading your audience—observe them constantly and keep amending your styles.

Table 3. *Characteristics of the different learning styles*

Learning style	Indications	Is often	How this learner can help the trainer	Teaching style
Active learner	Sits on the edge of the chair, keeps nodding, shows expression of agreement	Not listening. Can articulate very well—very interactive during the training	Ask this person to answer—when no one is doing so—this person's skills of expression can be used to break ice	Examples, catchy words
Reflective learner	Sits quietly, keeps observing other trainees. Calm, keeps thinking something on his own—draws circles in the notes…	Listening—but with prejudice. He listens to you but may not believe in you… May ask hypothetical, long questions	By bringing in different perspective to the subject—bringing in benefit of doubt	That constantly provides proof of providing data, pictures (this person will not believe in things like great, large—he needs specific data)
Theorizing learner	Keeps writing notes, hardly participates in the discussion, expects details	Is isolated in the group, does not speak much, keeps updating his notes even at break time	Has good reference material ready for you! Ask this person to give an over view of what was taught—he will do a good job	Be slow (so that he can write) do not need to look at him much as he is more interested in the board than in you
Experimental learner	Listens—but with doubt. Needs much more than slides to convince him	Is a bit arrogant—wants to share his experience and wants to challenge the teacher… He thinks the teacher is theoretical but he is the one who knows the ground level realities much better	Brings in pragmatic examples	Show him pictures, field data, he should be the first one to go to a field trip -Control this person—do not let him take over the class

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Session 5:

Training styles for adults

1   Introduction

Because of the aspects highlighted earlier (see Session 1: Adult Learning definition and unique features), it is important to adapt our teaching/facilitation styles to our audience, trying to accommodate for the different learner styles.

2   Session guide

Objectives

At the end of this session the trainer will be able to:

- Identify characteristics of a good training program
- Identify effective training styles for adults
- Devise effective ways of handling difficult situations in adult training

Training activities

Activity	Detail	Time
Plenary discussion	Ask participants to share examples of their best and worst training experiences	15 mins
Plenary presentation	Characteristics of a good training program/trainer	30 mins
Handouts and reference materials		

Training materials

Flip charts; marker pens; projector

3   Session presentation

Session 5:
Training styles for adults

Session Objectives

Identify characteristics of a good training program

Identify effective training styles for adults

Devise effective ways of handling difficult situations in adult training

Session sub-sessions

5.1 Characteristics of a good training program

5.2 Essentials of training approaches

5.3 Training styles

5.4 Characteristics of a good trainer

5.5 How to handle difficult situations

5.1   Characteristics of a good training program

An environment that fosters intellectual freedom

The faculty treats adult students as peers

Self-directed learning; students take responsibility for own learning

Pacing or intellectual challenge

5.1 Characteristics of a good training program
(cont.d)

Active involvement in learning; not passively listening to lectures

Regular feedback where students tell the faculty what works best for them

---

5.2 Essentials of training approaches

Adult learning is a two-way process

Treat the trainees as peers not as students

Vary your teaching style to meet different needs

Encourage understanding rather than memorizing

Create a respectful environment: everybody is comfortable

5.2 Essentials of training approaches
(cont.d)

Listen to the participants; learn from them

Agree on timing, basic ground rules and topics

Be sensitive to cultural issues

Constantly motivate participants to learn and listen

5.3   Training styles

Broadly two major styles:

1. Supervisory style: ...

-the leader provides specific instructions about 'what' and 'how' goals and tasks will be accomplished

-the leader also closely supervises the individual's performance

Most decisions made by the leader; team members are supposed to follow them

5.3   Training styles *(cont.d)*

2. Supportive style: ...

-the leader listens, encourages and facilitates self-reliant decision-making and problem solving

Usually there is no strict distinction in the adoption of the two styles, and they can be mixed corresponding to how the audience follows the trainer

5.4   Characteristics of a good trainer

-Use appropriate range of learning methods and material (don't overdo one, … keep changing the style)

-Encourage understanding not memorizing

-Make it possible for learners to use their own style of learning

5.4   Characteristics of a good trainer
(cont.d)

-Provide opportunities for interactions—experience sharing:

    Learn—not just teach

    Listen—not just speak

5.5   How to handle difficult situations

Examples of difficult situations in adult classes:

    -When the trainers are very non receptive

    -Trainees not paying much attention to trainer

    -When the space is like a class room

    -Cultural insensitivity

    -Language barrier—having to use translators

    -Names: difficult to pronounce

4   Session notes

5.1   Characteristics of a good training program

- An environment where students feel safe and supported, where individual needs and uniqueness are honoured, where abilities and life achievements are acknowledged and respected.
- An environment that fosters intellectual freedom and encourages experimentation and creativity.
- An environment where faculty treats adult students as peers—accepted and respected as intelligent experienced adults whose opinions are listened to, honoured, appreciated. Such faculty members often comment that they learn as much from their students as the students learn from them.
- Self-directed learning, where students take responsibility for their own learning. They work with faculty to design individual learning programs which address what each person needs and wants to learn in order to function optimally in their profession.
- Pacing or intellectual challenge. Optimal pacing is challenging people just beyond their present level of ability. If challenged too far beyond, people give up. If challenged too little, they become bored and learn little. Pacing can be compared to playing tennis with a slightly better player; your game tends to improve. But if the other player is far better and it's impossible to return a ball, you give up, overwhelmed. If the other player is less experienced and can return none of your balls, you learn little. Those adults who reported experiencing high levels of intellectual stimulation—to the point of feeling discomfort—grew more.
- Active involvement in learning, as opposed to passively listening to lectures. Where students and instructors interact and dialogue, where students try out new ideas in the workplace, where exercises and experiences are used to bolster facts and theory, adults grow more.
- Regular feedback mechanisms for students to tell faculty what works best for them and what they want and need to learn—and faculty who hear and make changes based on student input.

5.2   Essentials of training approaches

Below are some points to keep in mind when facilitating sessions for adults:

- Adult learning is a two-way process: adults have a lot of experience and can contribute to the sessions with real live examples or bring up situations where the issue being taught could have been of use.
- Although the trainer leads the sessions he or she should treat the trainees as peers not as students.
- Because of the different learning styles, vary your teaching style to meet the needs of the different learner type.
- Encourage understanding rather than memorizing. Adult learners need to be able to apply the new information in their daily lives otherwise it will not be very useful for them.
- Create a respectful environment: everybody should be comfortable contributing to the sessions. For this to happen, be aware of dominant speakers and disrespectful behaviour by other trainees maybe because of language issues or background.
- As a trainer: make sure that you listen to the participants and not just speak; similarly: learn from your participants, not just teach!
- In a participatory way agree on timing, basic ground rules, and where appropriate, topics.
- Be sensitive to cultural issues. This is sometimes difficult but try to familiarize yourself with the common practices if you go to a new country or region.

- Constantly motivate participants to learn and listen. A constant attention span of an adult is 15–20 minutes. Be aware of this and try to do something different every 15 minutes to not lose their attention.
- Effective adult learning is a two-way process—your teaching style, language, material used should be based on this…. The moment one tries to impose knowledge on the audience—you lose them.
- In adult learning, the trainer has to play a leadership role.
- One of the fundamental differences between adult learning and school learning is that you get a mixed group—different ages, cultures, different genders, backgrounds, experiences…. Thus one leadership style or one coaching style does not fit all—one has to constantly change styles.

Figure 8. *Adult students being shown how to work with cards and seeds in depicting a system.*

5.3   Training styles

Every facilitator has a unique style and training preferences. Some are more prescriptive, others allow the participants to take an important role in the session. Broadly speaking, there are two major types of styles:

- Supervisory style: In supervisory style, the leader provides specific instructions about 'what' and 'how' goals and tasks will be accomplished. The leader also closely supervises the individual's performance. Most decision in this style are made by the leader and team members are supposed to follow them.
- Supportive style: In supportive style, as opposed to the supervisory style, the leader listens, encourages and facilitates self-reliant decision-making and problem solving.

Usually there is no strict distinction in the adoption of the two styles, and they can be mixed corresponding to how the audience follows the trainer. In some situations the trainer needs to be more supervisory while in other situations they should be more supportive. In participatory training courses for adults' trainers should as much as possible be supportive, encouraging contributions from all participants.

5.4   Characteristics of a good trainer

- Use an appropriate range of learning methods and material (do not overdo it, keep changing the style)
- Encourage understanding not memorizing
- Make it possible for learners to use their own style of learning
- Provide opportunities for interactions—experience sharing
- Learn—not just teach
- Listen—not just speak
- Make the topic and time decisions participatory
- Create a respectful environment
- Be sensitive to cultural issues

Malcolm Knowles, a pioneer in the study of adult learning, observed that adults learn best when:

- They understand why something is important to know or do
- They have the freedom to learn in their own way
- Learning is experiential
- The time is right for them to learn
- The process is positive and encouraging.

5.5   How do you motivate adult trainees

- Hype up the subject—tell them why they should be learning this
- Break the barrier—make them feel comfortable
- Set an appropriate level of difficulty—challenge the participants but not too high to over load them with information—and not too low to bore them
- Interact–ask–listen
- Practical lessons are more motivating then theoretical
- Tell them how their learning will give them an edge over others
- Keep telling them about the 'coming attractions'
- Motivating factors—venue, social events, role plays, gifts, field visits
- Travel (increases receptivity)
- 'Sprinkle' their names in the course of teaching. This shows you recognize and appreciate their presence and contribution to the course and enhances participation.

5.6   How to handle difficult situations

Below are examples of common difficult situations in adult classes

- When the trainers are very non receptive they keep talking to each other without paying much attention to trainer
- When the space is like a class room
- Cultural sensitivity (see Aluma, Jeff)
- Language barrier—have a translator to interpret the training
- When names are difficult to pronounce (write down name tags and ask them to write according to how they would like to be called)
- When a trainee sleeps
- When a trainee keeps asking long and irrelevant questions.

Reference

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Session 6:

Training materials and presentation skills

1   Introduction

Often trainers are encouraged to use training materials to support dissemination of information to be shared with course participants. There are several training materials that can be applied depending on the course content, venue (facilities available), and how prepared the trainer is to develop and use the materials. The common training materials are boards (white or black board), charts on stands, charts on walls, and PowerPoint presentations. Trainers may also come prepared with or develop models for demonstration or organize a field trip to expose participants to information that cannot be brought to class.

In this section we describe some of these materials and point out their effective use, as well as presentation skills that lead to better participation and understanding. We also describe in details issues to be kept in mind when organizing a training field trip.

2   Session guide

Objectives

At the end of this session the trainer will be able to:

- Identify fundamentals of good presentation skills
- Demonstrate the effective use of visual aids in adult learning
- Develop effective learning aids

Training activities

Activity	Detail	Time
Plenary discussion	Brainstorm with participants on the essence of good presentation skills	15 mins
Plenary presentation	Fundamentals of good presentation skills	30 mins
Group exercise	Participants share in groups the rationale for visual aids in adult learning	
Break	Health break	
Plenary presentation	Participants share group findings Trainer makes presentation on use of visual aids	
Handouts and reference materials		

Training materials

Flip charts; marker pens; metacards

Session 6:
Training materials and presentation skills

Session objectives

Identify fundamentals of good presentation skills

Demonstrate the effective use of visual aids in adult learning

Develop effective learning aids

Session sub-sessions

6.1   Fundamentals of good presentation skills

6.2   Body language of a trainer—non verbal communication

6.3   Use of visual aids

6.4   Use of Venn diagrams

6.5   Field visits

6.1   Fundamentals of good presentation skills

Be aware of the following: ....

- Knowledge of the subject

- Regulate your breathing

- Vary vocal pace, tone, and volume

- Looks (personality, dress, appearance)

- Interaction

6.2   Body language of a trainer—
              non verbal communication

Aspects to think of:

Dress code:
... can be formal if there is official attendance

... But be comfortable in what you wear

Body movements and posture
... advisable to move around but not distractedly

6.2   Body language of a trainer—
              non verbal communication *(cont.d)*

Eye contact
... Regularly scan the audience to see if all
participants are paying attention

Confidence
... balance between being humble and confident

Voice
... Nonverbal speech sounds such as tone,
volume, rhythm are important

6.3   Use of visual aids

Aspects to think of:

PowerPoint: ...

Chart: ...

Models: ….

Venn diagrams: ...

Field visits: ...

4   Session notes

6.1   Fundamentals of good presentation skills

- No one is born as a trainer but for some people it is less difficult to face an audience than for others. We can improve our presentation skills by practicing, this is very important to be clear in our mind what we want to say, when and how. Try to practice your presentation before a test audience such as your work colleagues or your family. Because they may not be familiar with some terminology you may use, it will help you find ways to explain technical concepts in normal language. This is very important to ensure that all participants (regardless of their background) understand what you mean.
- When conducting the session during the actual training course be aware of the following:
  - Knowledge of the subject—research the topic if needed. Make sure that you are able to answer most questions. If you do not know something, be honest about it. You can ask your colleagues, or if you are alone: tell the audience that you will get back to them later in the day or the next day.
  - Regulate your breathing—When we are nervous we tend to forget and this can lead to tension. Sometimes it helps if you have something in your hands that you can put down; it can help you regulate your breathing.
  - Vary vocal pace, tone, and volume—A monotonous tone may lose participants' interest in the presentation.
  - Looks (personality, dress, appearance)—Our looks should not be too distracting for the audience. Avoid shiny or noisy jewellery and very bright colours.
  - Interaction—Try to include the audience by calling their names, this shows you are interested in them and that you believe they have something to contribute to the session.

The presentation and talking style should follow a pattern of introduction, focus and re-presentation of what has been covered as shown in Noonan's diagram (Figure 9).
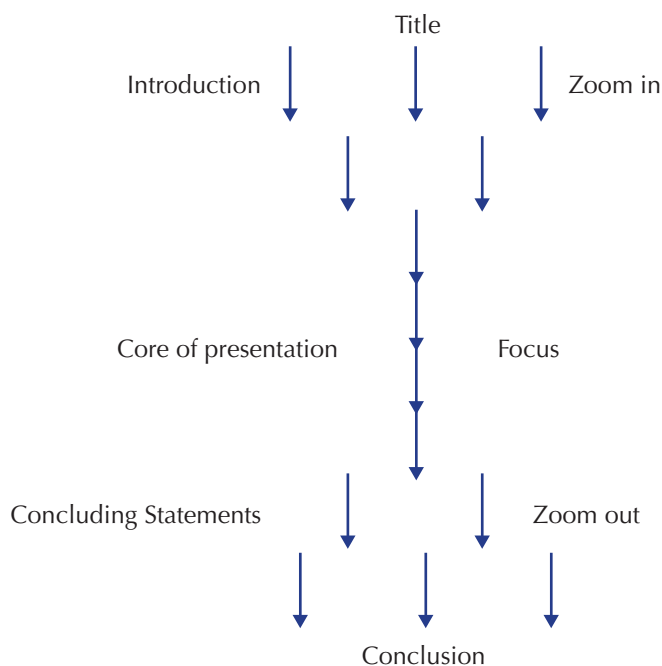

Source: Noonan (1999).
Figure 9. *Structure of the presentation flow.*

'Tell them what you want to say, tell them and tell them what you told them.'

6.2   Body language of a trainer—Non verbal communication

- The body language of a trainer is very important; it can make or break the training. Body language impacts a great deal of how we communicate, and can reflect quite accurately what's going on inside us but also inside the trainees.
- As everywhere, the first impressions are important, keep this in mind when you conduct a training course. Try to be friendly, smile and engage everybody. Be natural, it is ok if you are a bit nervous; even for the most experienced trainer the first hours of a training course are always stressful.
- There are several aspects we need to think of:
  - Dress code—the way you dress as a trainer is important. Often the first day of a training course is more formal since some officials may attend the opening sessions. In general, in PE training courses the dressing is a bit informal, but most importantly it is important that you are comfortable in what you wear. It should allow you to move around freely since in these courses we often have activities on the ground when explaining the tools.
  - Body movements and posture—in order to include all participants it is often advisable to move around (more details on the seating arrangement in the next chapter). You do not want to be moving all the time but when you give a PowerPoint presentation the danger exists that you stay next to the computer for the entire duration of the session. This is not advisable and should be avoided. When working with a flip chart holder be aware that you do not face the board all the time…. Moving around is also a good way of silencing some participants that are having a side conversation… just your presence will make them stop. Try it… you will see it works!
  - Eye contact—try to scan the audience to see if all participants are paying attention.
  - Confidence—there is a balance between being humble and confident. We assume you are knowledgeable about the subject, even if it is your first training course, the fact that you are a trainer should give you enough confidence to give a session. On the other hand you do not want to be perceived as arrogant, behaving as if you know everything. Always remember that participatory approaches are about co-learning, we learn every day from a variety of people including our trainees!
  - Voice—Nonverbal speech sounds such as tone, volume, rhythm are important communication elements. When we are nervous we tend to speak faster which may be a problem for some trainees to follow especially if the training course language is not their mother tongue. Be aware of this and make an effort to speak slowly.

Figure 10 shows the results of studies done that show us the percentage of understanding that is gained from the spoken word. It is considerably less than the meaning that people gain from listening to a person's tone of voice and looking at their nonverbal communication.
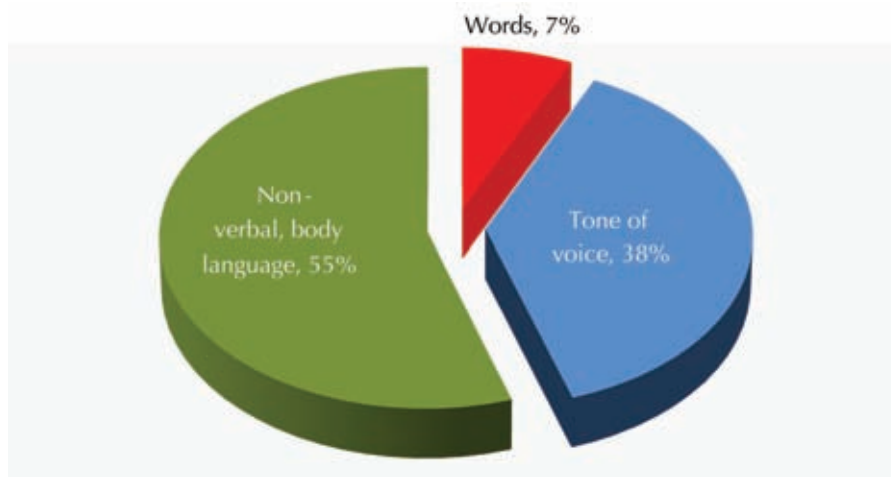
Source: Covey (1989).

Figure 10. *Understanding gained from spoken word.*

- Dos and don'ts of the spoken word in training

Do's:

- Dress code… (every profession has a dress code attached to it).
- Introduce yourself well or have someone introduce you well.
- Show confidence—the first look, enter in style, chin up—the people are judging you from the confidence you show.
- Be natural (in your pronunciation, language)—use simple language that you use in day to day life.
- Be humble—but to a limit (you perhaps know this subject better than me. I apologize if I make any mistake).
- Mingle with the trainees while they are working in a group exercise.
- Scan through the audience all the time.
- Listen while the trainee is speaking. Listen with respect (do not be ashamed of asking a question in return).

Do not:

- Speak with a stick in the hand
- Point your finger(s) at a trainee
- Sit on one of the desks/standing.

6.3   Use of visual aids

- Visual aids are very useful and important to deliver our message. PowerPoint is frequently used these days for training purposes but we would like you to think if a PowerPoint presentation is really needed for explaining some of the concepts in relation to participatory epidemiology.
- As you may have experienced yourself, when using a PowerPoint presentation we often forget to include the audience and are too focused on what is written on the screen. It is often better to work with flip chart papers which allow for a more participatory approach.
- Some experts use the 10–20–30 rule for PowerPoint presentations:
- 10 slides are the optimal number to use for a presentation;
- 20 minutes is the longest amount of time you should speak; and
- 30 point font is the smallest font size you should use on your slides.

- Some comments on this rule: maybe 10 slides are too few, what we want to stress is that you carefully evaluate if you really need the slide or not. It is not realistic to have 60 slides for a one hour presentation.
- For the 20 minutes rule: also this should be flexible, however, try to keep in mind that after 20 minutes adults often get bored. Try to introduce something else (such as group work or a demonstration of a tool).
- Font size 30 is good; too often we try to put too much on one slide which makes the audience loose interest. If you are well prepared you only need some bullets to remind you of the topics (a bit like a checklist of things you need to mention).
- Last but not least, for PowerPoint presentations:
  - use a 'calm' background to avoid losing focus on the content;
  - avoid animations on the slides, this is too distracting and the audience will be more focused on how the next will appear on the slide than on the actual content;
  - use one font type only;
  - check before the presentation how the presentation looks when using the projector since often these machines distort colours.
- Charts
  - The use of charts serves several useful purposes. The first is that they give participants and the trainer an opportunity to be active during a session because in many cases they are developed DURING a session. Getting participants to do their own write-up increases active participation and involvement.
  - Writers should be encouraged to use mixtures of coloured pens and the charts are left on walls or stands. This creates a relaxed cheerful mood and enhances an encouraging working ambiance.
- Models

6.4   Use of Venn diagrams

- The purpose of this tool is to explore relationships among stakeholders and within stakeholder groups through institutional mapping. Often it is easier to draw or represent something graphically rather than to talk about it. It is a way of de-verbalizing sensitive information regarding relationships. It is not a very commonly used tool but it can be useful in certain situations.
- The size of the circles should represent something easily quantifiable: number of people involved, money spent; bigger circle represents more, smaller circle, less. The distance of the circles from each other indicates the type of relationship: if the circles are close together it means there is a strong relationship (productive); if they are far it means the relationship is weak (less productive).
- Method:
  1. Prepare circles of various sizes (5–6 different sizes are normally enough). The number of circles will depend on the number of participants and the number of stakeholders identified. Make sure you have enough circles, it is better to have too many than too few!
  2. Ask the participants to make a vertical list of the different stakeholders relevant to the topic you want to learn about (make sure you leave some space between each name). Often it refers to the different group a community interacts with for a certain purpose. For example, organizations or agencies involved in animal health care delivery in a village.
  3. Depending on the criterion used, ask the participants to pick which circle fits each stakeholder group. After the participants have discussed and agreed which size of circle best corresponds to the stakeholder group, write down the initials or the name on the circle.

4. Now it is time to move to the second part of the exercise: Ask the participants which of the stakeholders they have the most productive and best relationship with or how important are they in relation to the topic you are studying, e.g. animal health care delivery in a village. Ask for each of the circles what the type of relationship is. Give the participants time to discuss. To express that certain groups are related you can make the circles overlap as shown in Figure 11.
5. As with all PE tools, once the Venn diagram is complete the facilitator needs to question the results.
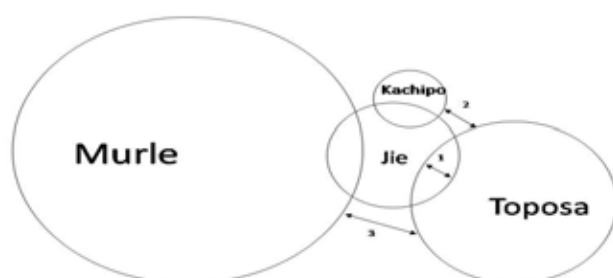
Source: J. Mariner.

Figure 11. *Venn diagram show relationships among tribes in Southeast Sudan.*

- This version of developing Venn diagrams (Figure 11) only shows the perception of the participants with regards to their relationship with other stakeholders not the relationship between stakeholders themselves. This component can be added to the Venn diagram by letting participants use marker pens to draw lines between the circles, thicker lines can mean closer relationship, thinner poorer relationship.

6.5   Field visits

- Field practice is a very important component of the training course. Participants need plenty of time with 'real informants' in order to practice the skills learned in the classroom and develop the capacity to adapt methods to suit particular situations. Field practice sessions need to be planned well in advance. Each group of 3–5 trainees needs enough villages/groups of people to practice interviewing and use of PE tools during 4–6 field practice sessions. This is likely to require planning with local leaders before the training course to ensure that livestock keepers are informed in advance and the interview is at a convenient time for them. The timing for practical work should fit with the livestock keepers' availability. Adequate transport should be organized.
- The biggest challenge to setting up fieldwork is handling the livestock keepers' expectations after spending their time with the trainees. If the PE training fits into a larger animal health program that will be conducted in the area, the livestock keepers should be told about the program and what it will involve. The training may even be used as a starting point from which to launch the program. Often, however, the PE training will be a one-time event for the area where the training is conducted. In this case, the field practice coordinators need to be very honest with the livestock keepers and let them know not to expect any material goods such as vaccines or medicines after the training session. Some may choose not to participate after knowing this, which is fine. Local animal health workers should be included in the planning of fieldwork and may also accompany the trainees to the field. In this case, the worker may be able to address the issues that are brought out during the practice session.

- *Planning for the field practice* — The following should be addressed in advance of the field practice session:
  - Consultation with local authority leaders on where and when the field practice will take place and permission to work in the area
  - Background information on the livestock and management practices in the area to be sure they fit with program objectives
  - Identification of a focal person to link and coordinate the training team with the local community (perhaps a local animal health worker)
  - Meeting sites identified keeping in mind the possibility of severe (harsh) weather
  - Timing of fieldwork should be convenient for the livestock keepers
  - Official documentation of the field practice session including the number of interviews per day, number of practical days during the training workshop, number of participants (interviewees) expected per interview (5–15), number of interviewers per group (3–5) and sites of the meetings
  - Transportation arrangements for participants
  - Preparation of equipment and stationery for field work
  - Last minute confirmation with communities to make sure they are ready to welcome participants. This should be done in person 1–2 days before the fieldwork session.
- *On the day of the field practice* — The following should be addressed on the day of the field practice session:
  - Field practice focal person and trainers should brief the trainees on the situation in the field (number of informants to expect, what informants have been told about the fieldwork etc.), amount of time allotted for fieldwork, and what is expected of them after the fieldwork is completed
  - Discussion on professional and culturally sensitive conduct in the field (including smoking, use of cell phones and digital cameras etc.)
  - Trainees should be broken up into groups of 3–5 people and roles assigned (who will be the interviewer, who will be the data recorder, which tools will be used and who will explain them to informants and conduct them in the field)
  - Each group should be accompanied by a facilitator or focal point
  - Refreshments, equipment and materials gathered
  - Transportation confirmed and driver briefed on behaviour during field practical.
- *After the field practice* — The following should be addressed after the field practice session:
  - Each group should prepare a short presentation on the results of their fieldwork. This may include:
  - Group members and their roles
  - Tools used
  - Main results (will depend on checklist used)
  - Self-assessment (what went well, what went wrong, what could be improved next time)
  - Facilitators and focal points should give feedback on observations in the field.
- To make it more interesting the feedback format should vary for each field practice. A good way of comparing results of the different teams is to have flip charts covering different topics of the checklist on which each group can add their answer (see Figure 12).

Figure 12. *Use of flip chart to record and show field visit observations.*

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Session 7:
Evaluation of an adult training course

1   Introduction

As with any activity an evaluation should be conducted to support the improvement of the training processes, either while it going (e.g. using the mood metre described below) or in future by analysing grades and comments provided by participants grading the course at the end of the training.

The evaluation of the training and participants' performance could be carried out at the end of the training or continuously during the training at particular times, e.g. end or beginning of each day. During the training, feedback from participants on their opinions can be collected using what is known as a 'mood metre' in which participants can rate their mood and write comments about how the training is going.

2   Session guide

Objectives

At the end of this session the trainer will be able to:

• Explain the purpose of evaluation
• Identify different course evaluation techniques
• Design course evaluation tools
• Evaluate how the course has progressed for lessons for future

Training activities

Activity	Detail	Time
Plenary discussion	The trainer leads the participants in brainstorming on the essence of evaluation	15 mins
Plenary presentation	Fundamentals of good presentation skills	30 mins
Group exercise	Purpose of evaluation/evaluation techniques	
Handouts and reference materials		

Training materials

Assorted markers; felt pens; flip charts

3   Session presentation

Session 7:
Evaluation of an adult training
course

Session objectives

Explain the purpose of evaluation

Identify different course evaluation techniques

Design course evaluation tools

Evaluate how the course has progressed for lessons for future

Session sub-sessions

7.1   What and why we evaluate

7.2   Evaluation using surveys

7.3   Evaluation using plenary responses

7.1   What and why we evaluate

What:

Extent of content coverage;

Effectiveness of course design and process for
participants' understanding and application

Participants experience during the course

Capacity of facilitators

Why:

Improve next training events

7.2 Evaluation using surveys

Questionnaires:

- most common data collection tools

- handed over towards the end of the course

- should not be too long to discourage filling adequate completion by every participant

- questions .... Combine score rating and open-ended opinion enquiries

---

7.3 Evaluation using plenary responses

Evaluation questions presented in plenary:
May allow discussions to arrive at consensus and recommendations

Mood meters
Can be used on a daily basis and participants should be able to post their comments anonymously

Facilitators should respond promptly to legitimate concerns that are raised

---

7.4 Continuous evaluation discussions

Informal reviews that assess both facilitator and participant performance can take place during session breaks

Whichever evaluation method ....

- trainers and program managers should respond to concerns, or

- review designs and plans for subsequent sessions

4   Session notes

7.1   What and why we evaluate?

There are key objectives that guide course evaluations, the main ones being gauging how well the content was covered and disseminated for participants' uptake and use. The second reason is gauging participants experience during the training course and whether the process was well designed for the participants' involvement.

- The questions to be used in evaluation content coverage and content-sharing objective include the following:
  - How would you rate this workshop in meeting your expectations
  - Coverage of particular chapters of the course, e.g. if all topics were covered adequately; what topics should be repeated or emphasized on, or have more details added; what topics were not relevant and should be removed
- Questions to be used to evaluate the course design and process include the following:
  - Course sessions' design, flow, and timing of activities (time management)
  - Extent of participation, sharing of knowledge and experience (adult trainers value this very much)
  - Adequacy of venue facilities and setting, especially with sensitivity to gender requirements
- Questions to be used to evaluate the faculty team include the following:
  - Knowledge of the course content, explanation of concepts and linking them with practical examples and experiential application
  - Facilitation process that engages the participants fully while allowing them to share their own experiences and concerns
  - Respect of participant diversity in personal characteristics, background, and states of knowledge
- Tools and procedures: Various tools and procedures are used to conduct training courses and the choice of method will depend on when the evaluation should be done and how much one wants individual responses.

7.2   Evaluation using surveys

The most common data collection tools are questionnaires handed over towards the end of the course. An example of an evaluation questionnaire is given in Annex 4: Evaluation questions/questionnaire—a sample.

The questionnaire should not be too long to discourage filling completely and adequately by every participant. Note that towards the end of the training most participants are tired and anxious to complete the course and long labourious questionnaire will not be used at all.

The type of questions asked should be a combination of rating and open-ended opinion enquiries that ask the respondent to indicate why they gave a particular score. The questions asked in Annex 4 give a typical example and it is the answers given in the open-ended sections that provide useful feedback on improvements required.

7.3   Evaluation using plenary responses

Other methods of course evaluation are plenary evaluation where participants (the entire class or in groups) are presented with the questions and there are discussions leading to consensus in ratings and recommendations.

One can adopt innovative approaches to create interest and fun in rating progress during the course, as shown in the daily mood metre and evaluation score chart in Figure 13. Mood metres can be used on a daily basis and participants should be able to post their comments anonymously. Facilitators should respond promptly to legitimate concerns that are raised.

Figure 13. *Two interesting ways of rating a training workshop—a mood metre and a Bull's Eye Score card.*

Informal reviews that go to both directions (from facilitator to participant and vice versa) can take place during session breaks and in the evenings.

Whichever method is followed, it is useful for trainers and program managers to take the findings seriously and either respond to concerns during the course of the training or review designs and plans for subsequent trainings using participant views and recommendations.

Annex 1: Participant questionnaire

Name: _____

Contacts address: e-mail, telephone:

_____
_____
_____

Professional background/role in community:

_____
_____
_____

Why do you need this training or how do you intend to use this training (brief paragraph or one-page summary):

_____
_____
_____
_____

Annex 2: Questionnaire: Previous training experience

Name:

1. Have you attended any training courses that included training in epidemiology or surveillance? Give dates, duration, location and description of training.

2. Have you been involved in disease surveillance during the course of your work? Describe the types of surveillance you have been involved in.

3. Have you attended any training courses that included training in participatory approaches, e.g. participatory rural appraisal (PRA)? Give dates, duration, location and description of training.

4. Have you ever used participatory approaches during field work? Describe the participatory methods used, for what purpose, when and where.

5. Have you ever trained others in the use of participatory approaches? Describe what training was conducted, for what purpose, when and where.

Annex 3: An example of a day's training session

Day of the week: _____

Time	Activity	Leader
09:00–09:30	Arrival, introductions, workshop objectives	
09:30–10:00	PRESA overview: Project context, challenge, objectives, progress so far, purpose of workshop	
	Developing workshop objectives—card writing and sharing in table groups	
10:00–11:00	OM introduction presentation and plenary discussion: What is OM? What is unique? Comparing with other approaches. What PRESA intends to achieve with OM	
11:00–11:30	Tea/coffee break	
11:30–13:00	OM presentation on vision and mission	
	Plenary questions and discussions	
	Groups develop examples of vision and mission from case example given	
	Groups present to rest of class	
13:00–14:00	Lunch break	
14:00–15:00	OM presentation on boundary partners, outcome challenges and progress markers	
	Plenary questions and discussions	
	Groups examples of boundary partners, outcome challenges and progress markers from case example given	
	Groups present to rest of class	
15:00–15:30	Tea/coffee break	
15:30–16:30	OM presentation on strategy maps	
	Plenary questions and discussions	
	Groups examples of strategy maps from case example	
	Groups present to rest of class	
16:30–17:00	Round up and day analysis	

Annex 4: Evaluation questions/questionnaire—a sample

Process evaluation and recommendations

Name **(optional)** _____

Tel or e-mail contact_____

Consider any of the following and give your score and comments along two questions following each point. Use brief, preferably bullet-point notes

1.   Workshop design, activities and timing

   Score (tick between 1 and 7, depending on your judgment)

Did not work at all						Was successful, very effective
1	2	3	4	5	6	7

a.   What has not worked well or did not work well at all? _____
_____
_____

b.   Suggestions and recommendations: _____
_____
_____

2.   Clarity of content (explanation of concepts, examples), leading to understanding

   Score (tick between 1 and 7, depending on your judgment)

Did not work at all						Was successful, very effective
1	2	3	4	5	6	7

a.   What has not worked well or did not work well at all? _____
_____
_____

b.   Suggestions and recommendations: _____
_____
_____

3.   Full participation

Score (tick between 1 and 7, depending on your judgment)

Did not work at all						Was successful, very effective
1	2	3	4	5	6	7

a.   What has not worked well or did not work well at all? _____
_____
_____

b.   Suggestions and recommendations: _____
_____
_____

4.   Sharing of experiences

Score (tick between 1 and 7, depending on your judgment)

Did not work at all						Was successful, very effective
1	2	3	4	5	6	7

a.   What has not worked well or did not work well at all? _____
_____
_____

b.   Suggestions and recommendations: _____
_____
_____

5.   Ways forward, direction and implementation beyond the workshop

Score (Tick between 1 and 7, depending on your judgment)

Did not work at all						Was successful, very effective
1	2	3	4	5	6	7

a.   What has not worked well or did not work well at all? _____
_____
_____

b.   Suggestions and recommendations: _____
_____
_____