Effective Training in Reproductive Health: Course Design and Delivery

Katherine Turner, MPH
Christina Wegs, MSW, MPH
and Betsy Randall-David, BSN, PhD

Editor: Jill Molloy, MA

Trainer's Manual

Ipas is a nonprofit organization that works around the world to increase women's ability to exercise their
sexual and reproductive rights, especially the right to safe abortion. We seek to eliminate unsafe abor-
tion and the resulting deaths and injuries and to expand women's access to comprehensive abortion care,
including contraception and related reproductive health information and care. We strive to foster a legal,
policy and social environment supportive of women's rights to make their own sexual and reproductive
health decisions freely and safely.

The illustrations and/or photographs used in this publication are for illustrative purposes only.
No similarity to any actual person, living or dead, is intended.

Effective Training in Reproductive Health: Course Design and Delivery

Trainer's Manual

Katherine Turner, MPH
Christina Wegs, MSW, MPH
and Betsy Randall-David, BSN, PhD

Editor: Jill Molloy, MA

Table of Contents

Part II: Clinical Training Approaches and Coaching Skills...................139

Appendices 164

Bibliography...202

About Ipas

Ipas works globally to increase women's ability to exercise their sexual and reproductive rights and to reduce abortion-related deaths and injuries. We seek to expand the availability, quality and sustainability of abortion and related reproductive-health services, as well as to improve the enabling environment. Ipas believes that no woman should have to risk her life or health because she lacks safe reproductive-health choices.

About this Manual

This manual is designed to be a resource for trainers who lead training-of-trainers courses in the field of reproductive health. It is designed to provide trainers with all of the instructions and materials they need to help learners strengthen their training, communication and facilitation knowledge and skills, and to enable them to plan and implement more effective training courses.

The manual:

● Leads learners through the core concepts and skills that trainers utilize when designing and delivering effective training.

● Promotes a learner-centered, participatory approach based on the principles of adult learning.

● Models the concepts and skills that are essential to effective participatory training, including group facilitation, coaching and the use of a variety of interactive training methods.

● Guides learners through the process of planning an effective training course.

● Offers learners the opportunity to hone clinical training and coaching skills.

No matter what audience or content matter will be the focus of a training course, the application of these principles and skills in the design and implementation helps ensure that the course will be effective in meeting the needs of adult learners.

The document has been organized into two parts, the first focusing on core training principles and skills and the second focusing on clinical training approaches and coaching skills. Trainers are welcome to add sessions or change the order as needed.

Part 1: Core Training Principles and Skills includes sessions on the principles of adult learning and adult learning styles, communication and facilitation skills, varied training methods, and the 12 steps of planning effective training courses.

Part 2: Clinical Training Approaches and Coaching Skills includes sessions on individualized clinical training approaches and clinical coaching skills.

Session Instructions
Each session includes all of the information trainers need to plan and prepare their training course, including: purpose, objectives, materials, advance preparation, time needed, instructions and additional materials such as worksheets, handouts, card

templates, case studies, role-play scripts and Microsoft PowerPoint® presentations. Session instructions are divided into numbered sections. Materials for each session are at the end of that session. The Microsoft PowerPoint® presentation slides are on the CD-ROM but are not included in the hard copy version of this manual.

● When trainers are instructed to label a flipchart, they only need to write the specified question or title at the top. When they are instructed to prepare a flipchart, they will need to write the title as well as other information indicated in the instructions.

● When trainers are instructed to prepare slides, they will need to: 1) print out transparencies, 2) create slides or 3) put the presentation on a laptop for use with a digital projector. Trainers are also instructed to make handouts for participants from the presentation with three, four or six slides per page and space for participants to write notes.

● It is important for trainers to prepare possible responses to questions and worksheets in advance so that they can respond appropriately to correct, incorrect and missing responses from learners.

A Note on Language
In this manual, the terms participants, learners and audience are used interchangeably; in addition, trainers are sometimes referred to as facilitators.

Companion Document
This trainer's manual is intended for use in training-of-trainers courses, along with its companion document, *Effective training in reproductive health: Course design and delivery - Reference manual*. The reference manual includes key training information and resources, some of which are not included in this trainer's manual.

How to Obtain Additional Copies
Both manuals are available free of charge on our website: www.ipas.org. A limited number of hard copies are available through Ipas's Training & Service Delivery Improvement unit - contact training@ipas.org. Each trainer's manual includes a CD-ROM with a pdf file of the manual and the slide presentations.

Acknowledgments

This document draws on and synthesizes training principles, models and materials that have been developed by Ipas and other reproductive-health training organizations, including CEDPA, EngenderHealth, Intrah, JHPIEGO, and Pathfinder. All of the information sources that were referred to in the creation of this trainer's manual or the accompanying reference manual are referenced in the bibliography.

The authors would like to thank everyone at Ipas who provided support and guidance in the conceptualization, development and review of this manual. Special thanks to all the members of the Training Task Force for providing ongoing support for this project, including Marian Abernathy, Nadine Burton, Nina Frankel and especially Jeannine Herrick. Colleen Carpenter, Emily Gertz, Doree Trottier and, most notably, Alyson Hyman helped develop and revise sessions for the manual.

Icons

The following icons are used in the manual to visually orient trainers to specific information.

Purpose: Star icon indicates the reason for conducting the session.

Objectives: Target icon indicates the skills and knowledge learners will acquire during the session.

Materials: Folder icon indicates when handouts, worksheets or other materials are needed.

Advance Preparation: Clipboard icon indicates steps trainers need to complete before the session.

Total Time: Clock icon indicates the total time allotted for the session.

Time in Minutes: Clock with minutes icon indicates the number of minutes (in increments of 5) needed for each numbered section of the session. Sections under 5 minutes do not have a clock with minutes icon.

Flipchart: Flipchart paper icon indicates when a flipchart is needed during a session. This icon will only appear once per numbered section.

Slide: Slide icon indicates where a Microsoft PowerPoint® presentation slide is to be used. This icon will only appear once per numbered section.

Talking Point: Voice icon indicates where accompanying text in italics may be spoken verbatim by trainer. (This text is a guide and can be adapted by trainers, as needed.)

Use of Reference Manual

Trainers and learners will need to have their reference manual on hand throughout the training course. Many handouts used in the sessions are in the reference manual. In many sessions, trainers will ask participants to refer to certain pages of the reference manual.

Training in Teams

The lead trainer will need to determine how many co-trainers are needed to effectively implement each session in the training course. Once the training team has been assembled, co-trainers should determine their roles, decide who will facilitate each session and review the information in the Training in Teams session to guide their discussions on how they will work together. Co-trainers should make time at the end of each day to debrief together about their work and the sessions; review learners' feedback from the daily evaluation activity; and make changes to improve the course. The Co-trainer Debriefing Form on page 134 of the reference manual is a useful guide.

Training Course Design

Guidance on training course design is covered fully in the reference manual. In the appendices of this manual, there is an overview of course sessions with a list of the sessions, purpose, time and materials to help guide trainers as they select sessions and design their training-of-trainers course with this manual. We have also included a sample course agenda to illustrate how sessions can be effectively ordered and emphasize the use of a beginning-of-day review/preview activity, icebreakers, energizers, breaks, closing activities and evaluations of the day, course and participants' knowledge. Certain sessions have been designated for an end-of-the-day reflection on activities and methods used throughout the course. Depending on whether the participants are clinicians, Part 2: Clinical Training Approaches and Coaching Skills may or may not be included. Sessions may be shortened by omitting certain activities. However, trainers should be aware that these activities were all designed to build on each other, appeal to all learning styles and contribute to the achievement of the objectives. Trainers are cautioned not to forego participatory activities.

Giving Directions for Activities

In general, it is advisable to give directions for an activity before asking learners to move or divide into groups. Once people begin moving into different configurations, they tend to be more distracted and pay less attention. It can be extremely helpful, especially for visual learners, to write the main points of the directions on a flipchart and post it in a visible place throughout the activity.

Distributing Handouts and other Materials

If you are making a presentation or lecture, it is preferable to distribute handouts in advance so that learners can follow and write notes on their own handouts during the presentation.

If you are distributing worksheets or other materials for an activity, it is preferable to give directions beforehand. Once you begin distributing papers, there is more noise and people tend to be distracted and less likely to pay attention to the directions.

Modeling Effective Training

After facilitating each icebreaker, energizer or evaluation activity ask learners why you might have selected that activity and what purpose it served. Once you have covered the Training Methods session, at the conclusion of each activity, ask learners to determine what type of training method was used in the activity and why it was selected. This practice of conscious training provides ongoing reinforcement and modeling of adult learning principles.

Creative Ways to Divide Learners into Groups

Use creative and varied ways to divide learners into small groups, such as:

- Having them select an item (such as a small toy, a colored object, etc.) out of a box, basket or hat and then asking the people with similar objects to form a group.

- Having them select a playing card and then asking all the people with the same card suit to form a group.

- Asking people to count off to the number of groups you desire and then having all of the ones, twos, threes, etc. form a group.

- Putting stickers on nametags in advance and then asking people with the same category of sticker (for example, animals, flowers, people) to form a group.

- Writing numbers or symbols on a slip of paper and attaching them to the underside of people's chairs in advance. Then when it is time to divide into groups, ask people to pull the slips of paper off and get together with people with the same number or symbol.

Note to trainers: Some methods, for example placing numbers under chairs, may make it more difficult to determine in advance the exact number of people in each group, especially if not all seats are filled.

Number of Participants in Groups

Trainers may need to adjust the number of participants in each small group or the number of small groups depending on the total number of participants and the type of small-group activity. Altering the number of groups will have an impact on time needed for the activity.

Group Process and Roles

Small groups are able to conduct their work more efficiently when group members begin by selecting a **recorder** to write down the key points discussed and answers to questions, a **timekeeper** to ensure that they are getting through all of the questions in the allotted time, and a **reporter** to present the group's responses to the larger group. Give groups a warning several minutes before their time is up to help them manage their time and complete their tasks.

Small Group Reports

Small-group reports — the report-back portion of the activity — can easily become tedious for the rest of the group. Encourage small groups and their reporters to be

concise, brief, energetic and creative in their presentations. Facilitate reports diplomatically, for example, by encouraging long-winded reporters to move on to their group's next response and holding questions and comments by the large group until all small groups have presented. It is important to keep learners' energy high and keep the reports moving.

Keeping Learners Energetic

Have several energizers prepared in advance. When learners have been sitting for a while and seem to be getting restless or bored, stop the session and facilitate an energizer activity that allows them to move and become more alert. Do not be afraid to interrupt a session and ask learners if they need a break when you have the sense that learners are bored, restless, overwhelmed or no longer able to absorb more information.

De-personalizing Characters in Role Plays and Skits

When learners are playing a role in a skit or role play, sometimes other learners forget to distinguish between the character and the person playing the character. This can create discomfort for the person playing the role. Remind learners to use language such as "when you were playing the part of the doctor…" or "when you, playing the patient, were saying…" when giving feedback on a character's dialogue or behaviors.

Including the Patient Role in Clinical Role Plays

When demonstrating or practicing clinical procedures in a simulated setting, it is crucial to include the role of the patient so that interpersonal as well as clinical skills are included. The person playing the role of the patient can sit or kneel so his/her head is just showing above the table, with the pelvic model on the opposite end of the table and a sheet covering the space in between. The person playing the patient should use appropriate facial expressions and communicate realistically with the person playing the role of the provider. During the feedback session, the person can affirm effective interpersonal skills and give suggestions for improvement. Playing the role of patient can also be helpful in developing provider empathy for patients.

Training Toys

Training toys refer to objects such as children's sculpting clay, Slinky™, stress balls and chenille stems or pipe cleaners - items that are colorful, quiet, can be formed into different shapes and can be played with by learners without distracting others. Kinesthetic learners are people who are more able to concentrate and learn when they are making physical contact with something. Training toys can also make the training site more visually interesting, spark learners' curiosity and facilitate creative thinking. Training toys should be placed on learners' tables at the beginning of the course. Learners should know that they are welcome to play with these toys throughout the course and to use them during activities, if appropriate. Trainers may want to introduce new toys during the course, or switch toys between tables to maintain learners' interest.

Purpose:

The purpose of this session is to welcome training course participants and solicit their expectations; orient them to the course objectives and agenda, trainer and participant roles, and group norms; and invite them to provide ongoing evaluation of the course. The aim is to create a safe learning environment that enables trainers and learners to achieve training course objectives.

Objectives:

At the end of this session, learners will be able to:

1. Describe the course goal, objectives and agenda

2. Identify trainers' and participants' roles and responsibilities, including the four task clock groups

3. Identify the training group norms

4. Name the evaluation methods that will be used at different points in the course

Materials:

❑ Slide presentation: Training Course Overview

❑ Slide handouts

❑ Flipchart

❑ Markers

❑ Handout: Course Agenda

❑ Task clock

❑ Items for dividing participants into groups

❑ Name tags

Advance Preparation:

❑ Prepare and copy slides and participant handouts

❑ Label flipchart: Course Expectations

❑ Prepare flipchart: Course Agenda

❑ Prepare and copy handout: Course Agenda

❑ Label flipchart: Parking Lot

❑ Prepare flipchart: Trainers' Roles

❑ Prepare flipchart: Learners' Roles

❑ Prepare task clock's four arms, one representing each group (see Instructions for Task Clock)

Part I: Core Training Principles and Skills

❑ Prepare task clock instructions and materials

❑ Prepare flipchart: Group Norms. Write a short list of the most important group norms and leave space for participants to contribute additional ones (see *Possible Group Norms*)

❑ Prepare suggestion box and cards

Total Time: 1 hour 15 minutes

Instructions:

20 minutes

1. Welcome participants and introduce the session: Training Course Overview.

   ● Show slide: Welcome. Welcome learners to the training course and thank them for their participation.

   ● Introduce yourself and provide some background on your training and facilitation experience. Ask learners to state their names and briefly give some background about themselves (their position title, where they work and any other pertinent information). Encourage learners to be concise.

   ● Show slide: Course Goal and discuss with participants.

      ❍ Develop participants' competence to plan, implement and evaluate effective reproductive-health training courses.

   ● Show slide: Course Objectives and discuss with participants.

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

         • Describe and apply the fundamental principles of adult learning and training.
         • Articulate the characteristics of effective trainers.
         • Demonstrate effective communication and facilitation skills.
         • Create a productive learning environment.
         • Describe and utilize appropriate training methods.
         • Design training courses to meet objectives.

      ❍ For Part II clinical training session only:

         • Describe different approaches to clinical training.
         • Demonstrate effective clinical coaching skills.

   ● Show slide: Expectations.

      ❍ Ask learners: What were you hoping to learn in this training course?

   ● Post flipchart: Course Expectations and write learners' expectations on the flipchart as they name them, but do not respond to them. Thank learners for sharing their expectations.

● Review the list, identify which expectations are likely to be met during the course and acknowledge any that may be beyond the scope of the training course.

● Show slide: Course Agenda.

　○ Distribute and review the handout: Course Agenda – briefly describe the content areas that will be covered during the course.

　○ Discuss possible changes that could be made to accommodate the expectations learners named.

　○ Solicit questions or concerns about the agenda.

● Show slide: Parking Lot – explain the purpose.

　○ Post flipchart: Parking Lot and explain that when topics come up during a training session that the group doesn't have time to address at that moment, or which would be better addressed at a later time, facilitators will write them on the Parking Lot flipchart, which means they are set aside to be discussed later in the course.

　○ Trainers set aside time at the end of each day to review the parking lot. At this time the group discusses whether they want to include the topic in the training course and, if so, when they would like to address it. Trainers will make changes to the agenda to include the topics participants have decided to address.

　○ Due to time constraints, sometimes trainers will have to ask participants to choose one topic over another.

> **Note to trainers:** You can ask participants to re-name the parking lot using a term that is more familiar for the context in which you are working. Alternate names include training basket, training drawer and training pot.

2. Discuss trainers' and learners' roles and responsibilities.

　● Show slide: Trainers' Roles.

　● Share the trainers' expectations about their roles, including:

　　○ Providing information.

　　○ Asking and answering questions.

　　○ Facilitating discussions and activities.

　　○ Making sure the group stays on task and on time.

　　○ Modeling effective training skills.

　　○ Maintaining a safe learning environment.

　● Post flipchart: Trainers' Roles and ask learners to share other roles that trainers should play during a training course. Write their answers on the flipchart.

　● Remind learners to provide feedback about the trainers' effectiveness.

20 minutes

We want to be sure that we are modeling effective training and facilitation skills. Please feel free to give us feedback throughout the training course if we are not meeting your needs.

Note to trainers: Remind learners that trainers may not have answers to all the questions that arise. Emphasize that trainers will facilitate the group working together to find answers to most questions. Learners have valuable skills and experience to share, and they will learn at lot from each other during the course.

● Show slide: Learners' Roles.

● Share trainers' expectations about learners' roles, including:

❍ Participating fully according to one's comfort level.

❍ Sharing knowledge and experiences with trainers and other learners.

❍ By participating and sharing our knowledge and experiences, we will all learn a lot from each other over the course of the training.

● Post flipchart: Learners' Roles. Ask learners to share other roles that learners should play during the training course. Write their answers on the flipchart.

3. Introduce the task clock and divide into groups.

● Show slide: Task Clock.

● Post the task clock in a central location and briefly explain it.

❍ The purpose of the task clock is to provide participants with the opportunity to practice selecting appropriate activities and facilitating them effectively.

❍ Learners will be divided into four groups.

❍ Each group is responsible for a different training task: icebreaker, energizer, evaluation and logistics. The groups will rotate to a different task daily.

❍ Trainers will provide group members the instructions and materials they need ahead of time. Group members should work together to prepare and facilitate their daily tasks. Trainers will be available to help guide the groups as they prepare, if needed.

● Use a creative method to divide participants into four groups (see *Using this Manual: General Training Tips* for more information).

● In advance, trainers will have created four clock arms, one for each group, and will have attached them to the middle of the clock face in such a way that the arms can be moved to point to each of the four quadrants. (Optional: design the arms to match the group categories.)

● Name the groups using categories that are appropriate to the context in which participants are working, such as four types of fruit, flowers and colors.

15 minutes

● Show how the arms of the task clock work and remind the four groups of their categories.

● Explain that the tasks will rotate when the hands of the clock are turned at the end of each day. Group members should look at the task clock to know which task they need to prepare for the next day.

● Prepare instructions and materials beforehand for the task clock groups to use. Choose five to eight activities for each of the three tasks — icebreaker, energizer, daily evaluation — and put them in folders as resource materials for the participants. You can provide the logistics group with a watch or clock for timekeeping, diagrams of room arrange-ments, or other materials needed for their tasks to be conducted.

● Explain that at the front of the room are materials that each group can use to prepare for its task. At the end of each day groups can come to the front and look through the folders, choose the activity they wish to use and gather the appropriate resources.

● Inform the groups that after they lead the activity, they should facilitate a short debriefing in which they present the rationale for their choice of activity and ask the rest of the participants to assess their choice.

● Show slide: Four Task Groups. Describe the four tasks — icebreaker, energizer, daily evaluation and logistics — in detail:

  ❍ Icebreakers: One of the first activities at the beginning of each training course day, icebreakers have a variety of purposes, including getting people acquainted with each other, getting peo-ple more engaged, building rapport and introducing the train-ing topics for the day. The group handling icebreakers for the day should review the available icebreaker choices in the icebreaker folder and pick one that is most appropriate for that day of the course. For example, a "get to know you" icebreaker is suitable for the first day of a course whereas a "transfer of skills" ice-breaker may work better towards the end of the course. The task group should discuss together what they feel is the most appro-priate icebreaker for their assigned day and why, and then prepare to lead the group in the icebreaker the next day.

  ❍ Energizers: These are generally more physical activities that get the energy level of a group up again when it is lagging. They are often done in the afternoon, but are appropriate whenever they are needed. Energizers are not just fun games, but always serve some purpose in the learning process. The group handling the energizers for the day should review the available energizer choices in the energizer folder and pick one that is most appropri-ate for that day of the course. It may be related to the content of the course that day, or to where the energy level is expected to be at that point in the training cycle. The task group should choose

their energizer and then be prepared to lead it at the right time during the course, gauging when the energy is low and the activity is most needed. The group should prepare the necessary materials and practice ahead of time.

❍ Daily evaluation: Done at the end of each day, the daily evaluations are a way to assist the trainers in getting feedback from participants about a day's activities and to help them to adjust the course as needed for the remaining days. Daily evaluations can be linked to specific content of the day or can be more broad and open-ended feedback. This task group chooses the evaluation, leads the activity and then compiles the results and gives them to the trainers before they leave for the day.

❍ Logistics: The roles for this group include keeping track of time, ensuring the room furniture and equipment are set up properly, and tidying up the room throughout the day to promote a productive learning environment. This task group should determine how to monitor time and let the trainers or groups know when they are almost out of time and then when a session should be finished. For example, they can prepare cards to flash time notices (for example, "five minutes remaining") to facilitators. They should also set up the room arrangement according to the trainers' needs, help move flipcharts and equipment around as needed during the day, and help straighten up after breaks or at the end of the day. The group can discuss how to ensure that the logistics are handled during their day, such as assigning specific roles to individuals in the group.

Note to trainers: Be sure to turn the clock's hands at the end of each day.

4. Establish group norms.

● Show slide: Rationale for Group Norms and explain that group norms are mutually agreed upon and they:

❍ Set guidelines for how the group will work together.

❍ Create a safe and respectful learning environment.

❍ Enable tasks to be accomplished efficiently.

● Post flipchart: Group Norms. Read norms listed.

● Ask participants which norms they don't understand and clarify them. Ask what norms they want to add or remove from the list.

● Once it seems the learners have agreed on the list, ask them to raise their hands if they agree to maintain these norms each time they come together.

● Hang the list on the wall where everyone can see it and explain how it will be used throughout the training course.

❍ The list will be posted throughout the course.

❍ Participants should refer to the list as needed.

❍ Reinforce that participants should agree to monitor themselves and raise concerns when they believe participants are not abiding by the norms.

Note to trainers: If at some point during the training course you detect that a participant is not abiding by the group norms, you can stop the discussion or activity, ask participants to review the group norms, and remind them that everyone agreed in the beginning to abide by these norms.

5. **Discuss the methods of feedback and evaluation that will be used throughout the course.**

● Show slide: Evaluation Methods. Discuss them with participants.

Methods	When
Suggestion box	Throughout the course
Informal feedback to trainers	Throughout the course
Daily evaluation activities	At the end of each day
Trainers' debriefing session	At the end of each day
Skills assessment tools	With each skill-based activity
Written evaluation forms	At the end of the course

● Designate and label a box or basket as the "Suggestion Box." Place index cards and pens next to the suggestion box. Invite participants to write comments on cards and place cards in the box throughout the training course.

● At the end of the day, meet with other trainers to discuss the day's training session, what went well and what needs improvement. Review the cards in suggestion box, any informal feedback given, and the results of the daily evaluation activity. The Co-trainer Debriefing Form can be found in Appendix 10 of the reference manual.

● Remind learners that at the end of the first day, trainers will facilitate the evaluation activity, but at the end of each subsequent day, a task clock group will facilitate a different evaluation activity.

6. **Show slide and present housekeeping information to learners.**

● Explain where bathrooms are located.

● Explain when and where breaks and lunch take place.

● Cover other housekeeping items.

● Ask if people have other announcements to make.

7. Link to next activity, an icebreaker.

Now we are going to do an icebreaker activity together, which is an activity that will help us get to know each other better. Starting tomorrow, different task groups will facilitate an icebreaker activity at the beginning of each day. Then we will move on to the session on Adult Learning Principles and Learning Cycle.

Note to trainers: Select an icebreaker activity from the Appendix of this manual or the reference manual that is appropriate for the beginning of a training course.

P o s s i b l e   G r o u p   N o r m s

Prepare a flipchart in advance with a few of what you consider to be the most important group norms. Leave space at the bottom for participants to contribute additional norms. Make sure that all participants can agree in the beginning of the course to abide by the norms they set. Ask participants to monitor themselves and the group and commit to raising concerns if they believe that not everyone is abiding by the norms. Group norms help everyone learn effectively.

● Speak one at a time; allow each person time to talk.

● Confidentiality (identifying details of what is said in this room stays in this room).

● Agree to disagree, but do so respectfully.

● Value each person's unique opinions and perspectives.

● Take risks; step outside your comfort zone.

● Start and end on time; come back from breaks promptly.

● Turn off cell phones and beepers.

● Honor everyone's input (regardless of educational degrees, professional or community status, or personal experiences with the topic).

● When you have questions, ask them.

● Speak for yourself, not other people (for example, begin statements with "I" rather than "everybody" or "you").

● Support those who may have anxiety talking about emotionally difficult topics.

● Take charge of your own learning (for example, take breaks, ask for clarification, give input to trainers if something about the course is not working for you).

● Have fun even though the topic is a serious one.

● Feel free to "pass" if a certain topic or activity is uncomfortable for you.

Task Clock
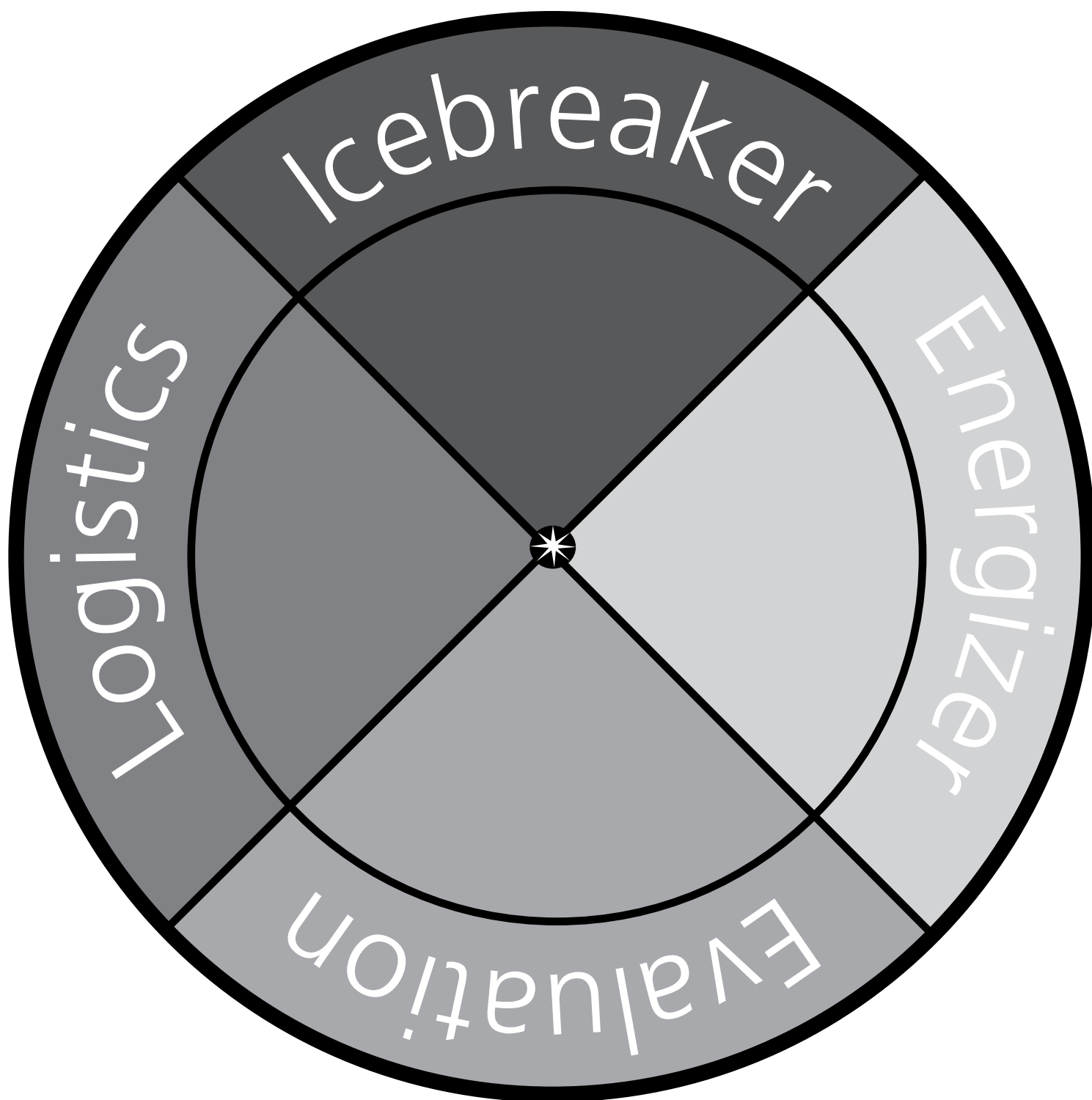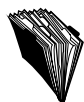
Instructions for Task Clock

Copy the task clock onto sturdy paper. Copy, color and cut out the four clock arms below (one for each task group) and attach them to the middle of the clock face so that the arms can be turned to point to each of the four quadrants. You could use brass fasteners, string with a knot on either end or some other means of securing the arms so that they are movable. You may want to design the arms to match the group categories you create, such as four types of fruit, flowers, colors, etc. See *Training Course Overview* instructions for more information on the task clock groups.
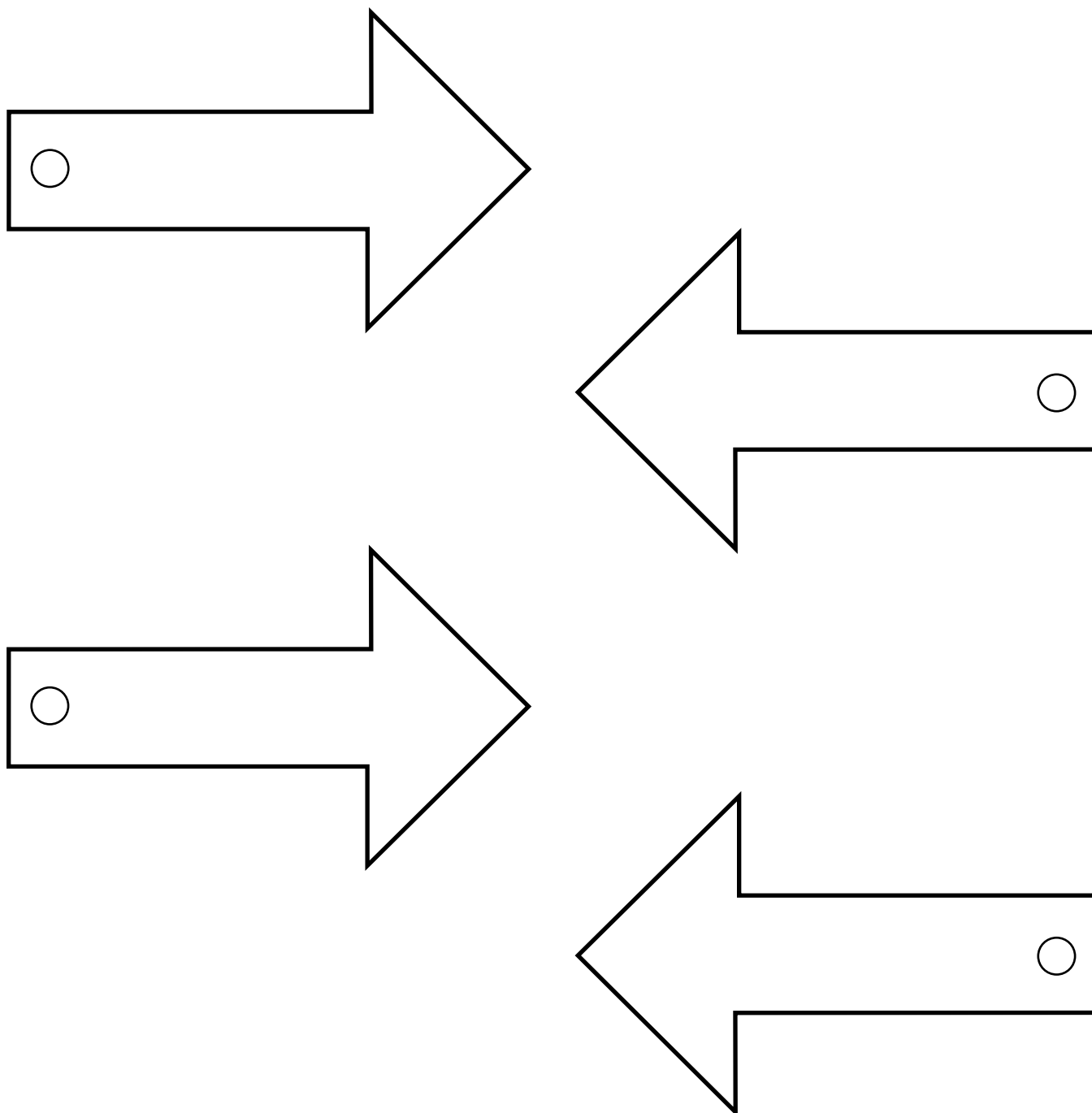
Adult Learning Principles and Learning Cycle

Purpose:

The purpose of this session is to introduce the principles of adult learning and the adult learning cycle. During this session, learners will identify the unique learning needs and preferences of adult learners and articulate strategies for course design and delivery that maximize learners' acquisition and retention of new knowledge and skills.

Objectives:

At the end of this session, learners will be able to:

1. Name the fundamental principles of adult learning

2. Describe adult learning needs and preferences

3. Articulate strategies for maximizing adult learners' knowledge and skills retention and recall

4. Explain the adult learning cycle

Materials:

❑ Slide presentation: Adult Learning Principles and Learning Cycle

❑ Worksheet: Adult Learning Principles – trainer and learner versions

❑ Chime or gentle noisemaker

❑ Items for dividing participants into groups

❑ Reference manual

Advance Preparation:

❑ Prepare and copy slides and participant handouts

❑ Prepare and copy trainer and learner versions of worksheet: Adult Learning Principles

Total Time: 1 hour 10 minutes

Instructions:

1. Introduce the session: Adult Learning Principles and Learning Cycle.

● Show slide: Adult Learning Principles.

5 minutes

During this session, we are going to discuss the ways in which adults learn new information and skills. We will also discuss strategies that trainers can use to maximize adult learners' knowledge and skills retention and recall.

● Show and discuss slide: Fundamental Principles of Learning.

❍ Learning involves more than just being exposed to new information.

❍ Participants in training courses have learned when they:

- Integrate and apply new information.
- Change their perceptions, feelings or values.
- Improve the way they perform old tasks.
- Demonstrate the ability to perform new tasks.

● Show slide: How do People Learn? Discuss the following points:

❍ Learning is largely an **associative** process through which participants relate new information to what is already known.

❍ Learning is enhanced when participants are able to **practice** applying new attitudes, knowledge and skills.

❍ Learning by **understanding** promotes better retention than learning by memorization.

❍ **Repetition** increases the retention of new knowledge.

❍ Changes are unlikely to take place unless the learner is **motivated** to learn.

2. Discuss adult learning principles.

● Show and discuss slide: Adult Learning.

❍ Learning does not end after childhood.

❍ Adults continue to learn new knowledge and skills throughout their lifetime.

❍ Often this learning is associated with taking on new roles and tasks in their communities and in their work.

● Show slide: Malcolm Knowles, father of adult learning, and read quote:

Facts learned in youth have become insufficient and, in many instances, actually untrue; and skills learned in youth have become outmoded by new technologies.

❍ Adults learn differently from children.

❍ Effective trainers understand how adults learn and design training to meet their needs.

● Show slide: Key Elements of Adult Education. Explain that effective education with adults:

❍ **Is participatory**

- Adults learn best when they are actively involved in the learning process.
- They are more likely to learn and retain new information when training courses create opportunities for them to

practice applying their new knowledge and skills.

❍ **Is supportive**

- Learning and practicing new knowledge and skills often involves making and correcting mistakes. This process can be difficult for adults, as they are often uncomfortable feeling incompetent and demonstrating incompetence to their peers.

- To help adults learn, create a supportive environment for experimentation and practice with new information and skills.

- Give learners positive reinforcement, such as praise and encouragement, instead of negative reinforcement, such as criticism.

- Give learners constructive feedback to help them improve their knowledge and skills.

❍ **Builds on the experience of learners**

- Provide adults an opportunity to build on existing perspectives, knowledge and skills and to share these with fellow learners.

- Value learners' existing experience, helping them feel comfortable experimenting with new knowledge and skills.

- Build on existing knowledge and skills, helping them link new knowledge to real-life contexts.

❍ **Is relevant**

- Include information and skills that are relevant to their workplace and community contexts.

- Provide opportunities for them to apply knowledge and skills immediately.

- Often, adults seek training opportunities when they assume new tasks and roles; adult learners are usually not motivated to use time and resources for training that they perceive as irrelevant to the tasks they regularly complete as part of their work and community lives.

❍ **Fosters opportunities for self-directed learning**

- Adult learners are accustomed to taking responsibility for their own decisions and actions, including choosing what they want to learn.

- They learn best when they are treated as active participants in the learning process.

> • Trainers should help them move from the role of dependent learners to self-directed learners.

3. Facilitate small-group discussion on strategies for working effectively with adult learners.

● Give instructions for the activity.

❍ Break participants into small groups and give the Adult Learning Principles – Learner's Version worksheet to each group. Use a creative method to divide participants into groups (see *Using this Manual* for more information).

❍ Ask each group to choose a recorder, reporter and timekeeper (see *Using this Manual* for more information).

❍ Assign the adult learning principles evenly among the groups. Each group will discuss their assigned principles, brainstorm a list of training strategies to address each principle and then write the training strategies in the third column of the worksheet.

❍ Tell the groups they have 15 minutes for this assignment.

● After ten minutes, give groups a five-minute warning, and then after 15 minutes sound chime to bring their attention back to the larger group.

● Ask each group to briefly report their list of training strategies for each principle. Suggest to the larger group that while other groups report, they may want to take notes about specific training strategies on their worksheets. Use your trainer's version of the worksheet to ensure learners' responses are appropriate.

● Summarize activity and transition to Adult Learning Retention and Recall.

4. Discuss adults' retention and recall of information and skills.

● Explain to learners:

❍ Information **retention** refers to taking in and storing what has been learned, while information **recall** involves retrieving this information for use at a later time.

❍ Learners may understand concepts presented to them and retain that information for a short period of time, but not be able to recall the information at a later date.

● Show and summarize the slide: Training Methods, Ways of Engaging and Learning Outcomes.

● Discuss how trainers can enhance participants' learning by engaging them in different ways through different types of training methods.

❍ Participatory methods such as role plays and case studies are

more engaging than passive methods such as reading and one-way lecture.

❍ Participatory methods allow learners to practice applying new knowledge, attitudes and skills.

❍ Different types of training methods are appropriate for achieving different types of objectives.

❍ Effective trainers select training methods that are most likely to help learners achieve the objectives of the course.

Training Methods, Ways of Engaging and Learning Outcomes

Ways of engaging	Types of training methods	Examples of possible learning outcomes
See	Read View images (e.g. Read publication, view posters)	Recall State Define Name List Label
Hear	Listen without visuals (e.g. listen to the radio or a recording)	
See and hear	Watch audiovisual (e.g. Watch a film, attend a lecture with visuals)	Describe Discuss Illustrate Explain
See, hear and say	Give a talk Participate in a discussion Analyze and discuss case studies	Analyze Formulate Synthesize Summarize Differentiate Apply Interpret Critique
See, hear, say and do	Create Design Model a simulated experience Perform the actual experience (e.g. Develop materials, conduct a role play, complete a clinical practicum)	Demonstate Perform Conduct Design

Adapted from Dale, Edgar. (1946, 1954, 1969). *Audiovisual methods in teaching.* New York: Dryden.

● Refer learners to the section on retention and recall on page 13 of the reference manual and discuss the following points.

As we have discussed, adults learn best when training courses are participatory and include hands-on training methods. Using participatory training techniques not only keeps training courses interesting, but also increases retention and recall of new information.

❍ Trainers can also structure training sessions in a way that maximizes retention and recall:

• Summarize important information at the beginning and end of a session.

• Review important concepts with learners, rather than only presenting ideas once.

- Show connections or associations between different concepts.
- Create learning exercises that engage multiple senses – touch, taste, smell, vision and hearing.
- Add movement to learning exercises so that physical gestures become associated with concepts or ideas.
- Use humor as a tool to help learners remember concepts, as well as to reduce tension or boredom.
- Emphasize key words and phrases to point out important information and emphasize main points.
- Use creative devices and visual cues, such as images and symbols, to stimulate learner recall.
- Number or color code concepts that are written on posters or charts.
- Limit periods of concentrated learning to 50 minutes or less by providing breaks.

5. Show slide: Adult Learning Cycle: Introduction.

● Introduce the topic.

❍ Adults learn new information by analyzing it and applying it to their own lives.

❍ Training is most effective when it is designed with the adult learning cycle in mind.

● Show slide: Adult Learning Cycle.

❍ Adult learning consists of four phases: experiencing new information, processing the information, generalizing the information and then applying the information.

● Show next slides: Adult Learning Cycle and discuss each phase in detail.

❍ **Phase 1: Learners experience new information.** The trainer:

- Sets objectives
- Clarifies group norms
- Gives directions
- Sets time limits
- Presents information in a stimulating manner
- Actively involves learners through questioning and discussion

❍ **Possible training methods to use for this phase:** group brainstorm, field visits, film/video.

❍ **Phase 2: Learners process new information.** The trainer:

- Facilitates learners' reflections on what they learned in phase one.

- Facilitates learners' sharing of their ideas and reactions with each other.

❍ **Possible training methods to use during phase two:** small-group discussion, case studies, small-group presentations.

❍ **Phase 3: Learners generalize the experience.** The trainer:

- Guides learners to derive meaning from their reactions to the new information.

- Is knowledgeable about the topic and its broader context.

- Should resist providing answers for learners.

❍ **Possible training methods to use during phase three:** large-group discussion, demonstration, individual reflection through writing.

❍ **Phase 4: Learners apply the experience to actual work or life situations.** The trainer:

- Helps learners relate what they have learned to their work or life situations.

- Helps learners plan for post-training application.

❍ **Possible training methods to use during phase four:** study tours, action planning, simulated skills practice, practice on actual clients.

● Stress the importance of designing training courses so that learners move through this cycle at least once every four hours of training.

● Show slide: Learning Cycle Example: Strategies to Reduce Stigma Experienced by People with HIV. Use this as an example to illustrate training methods that could help learners move through the adult learning cycle.

❍ For example, a training course might have an objective of increasing participants' understanding of the ways social stigma adversely affects people living with HIV and then helping participants to develop strategies for addressing HIV-related stigma in their communities. To accomplish this objective, we might employ four different methods:

- For the experiencing phase of the cycle, begin with a panel presentation of people living with HIV sharing their experiences with stigma due to their HIV status.

- For the processing phase, divide participants into small groups to discuss their feelings and reactions to HIV-positive people's experiences with stigma.

- For the generalizing phase, facilitate a large group brainstorm about other diseases that have carried similar social stigmas and the underlying causes of disease-related stigma.
- Finally, in the application phase, help learners develop solutions in the form of action plans to reduce the stigma for people living with HIV in their communities.

❍ Learners can refer to pages 12-14 of the reference manual for the Adult Learning Cycle.

6. Summarize the session.

● Show slide: Adults Learn Best When. Summarize some key points about effective education with adults:

❍ Adults learn best when…

- They feel valued and respected.
- The learning experience is active and not passive.
- The learning experience fulfills their needs.
- They accept responsibility for their learning.
- Their learning is self-directed and meaningful to them.
- Their learning addresses ideas, feelings and actions.
- New material is related to what they already know.
- The training environment is conducive to learning.
- Learning is reinforced.
- Learning is applied immediately.
- Learning occurs in small groups.
- The trainer values their contributions.

7. Link to next session.

Now that we're familiar with the central tenets of adult learning, let's move on to another important concept to consider when planning and conducting training courses: learning styles.

Adult Learning Principles
Learner's Version

Learners learn best when...	The trainer's role is to...	Training strategies include...
1. They feel valued and respected for the experiences and perspectives they bring to the training situation	Elicit and affirm learners' experiences and perspectives	
2. The learning experience is active and not passive	Actively engage learners in their learning experience	
3. The learning experience fulfills their immediate needs	Identify learners' needs and design training content and methods that meet these needs and are directly relevant to learners' experiences	
4. They accept responsibility for their own learning	Establish and enforce group norms that create an environment of individual and group responsibility for learning	
5. Their learning is self-directed and meaningful to them	Involve learners in deciding on the content that will be covered during the training course	
6. Their learning experience addresses ideas, feelings and actions	Use multiple training methods that elicit knowledge, attitudes and skills	
7. New material is related to what learners already know	Use training methods that enable learners to integrate new material and establish a relationship with existing information	
8. The learning environment is conducive to learning	Take measures to ensure that the physical and social environment (training space) is safe, comfortable and enjoyable	
9. Learning is reinforced	Use a variety of activities to facilitate learning similar concepts through different means and ensure prompt, reinforcing feedback	
10. Learning is applied immediately	Provide opportunities for learners to apply the new information and skills they have learned	
11. Learning occurs in small groups	Use small-group training methods that encourage learners to explore feelings, attitudes and skills with other learners	
12. The trainer values their contributions as both a learner and a teacher	Encourage learners to share their expertise and experiences with the trainer and other learners	

Adapted from Robinson, 1994.

Adult Learning Principles
Trainer's Version

Learners learn best when…	The trainer's role is to…	Training strategies include… (some possible responses)
1. They feel valued and respected for the experiences and perspectives they bring to the training situation	Elicit and affirm learners' experiences and perspectives	Ask learners to respond to questions before providing them with the answers
2. The learning experience is active and not passive	Actively engage learners in their learning experience	Include a variety of methods (such as case studies, role plays, demonstration) through which learners practice implementing new skills
3. The learning experience fulfills their immediate needs	Identify learners' needs and design training content and methods that meet these needs and are directly relevant to learners' experiences	Conduct a pre-training assessment to determine learners' needs and design the training course according to those needs
4. They accept responsibility for their own learning	Establish and enforce group norms that create an environment of individual and group responsibility for learning	Ask learners to commit to monitoring themselves and the group and raise concerns when people are not following group norms
5. Their learning is self-directed and meaningful to them	Involve learners in deciding on the content that will be covered during the training course	Ask for learners' expectations for the course before presenting the agenda and find ways to adapt the agenda to meet their needs
6. Their learning experience addresses ideas, feelings and actions	Use multiple training methods that elicit knowledge, attitudes and skills	While designing the course, keep a list to make sure you are employing a variety of methods

Adult Learning Principles
Trainer's Version

Learners learn best when…	The trainer's role is to…	Training strategies include… (some possible responses)
7. New material is related to what learners already know	Use training methods that enable learners to integrate new material and establish a relationship with existing information	When introducing new information, ask what learners already know and then link the new information to existing knowledge
8. The learning environment is conducive to learning	Take measures to ensure that the physical and social environment (training space) is safe, comfortable and enjoyable	Have music playing when learners enter the room Check with learners about the room temperature
9. Learning is reinforced	Use a variety of activities to facilitate learning similar concepts through different means and ensure prompt, reinforcing feedback	Design icebreakers, energizers and closing activities to introduce or reinforce content from the session Summarize what participants just learned before moving on to a new topic
10. Learning is applied immediately	Provide opportunities for learners to apply the new information and skills they have learned	Design activities so that once participants learn new information or skills, they practice applying them immediately
11. Learning occurs in small groups	Use small-group training methods that encourage learners to explore feelings, attitudes and skills with other learners	Divide participants into small groups to research new information, discuss in-depth content or practice applying new skills
12. The trainer values their contributions as both a learner and a teacher	Encourage learners to share their expertise and experiences with the trainer and other learners	Begin the training course by acknowledging that trainers do not know everything and there is a lot of collective wisdom and experience in the room Remember to ask learners to respond before providing answers If someone asks a question and you don't know the answer, ask learners if they know or could find out

Adapted from Robinson, 1994.

The purpose of this session is to introduce adults' different learning styles and discuss the importance of accommodating the full variety of learning styles in training courses. Ensuring that training courses are responsive to the various learning styles of all participants will enhance the effectiveness of the course and participants' learning experience.

Objectives:

At the end of this session, learners will be able to:

1. Demonstrate appreciation for the diversity of learning styles

2. Name the different learning styles and describe their characteristics, preferred trainer roles and training activities best suited to them

3. Articulate why it is important to include training methods that are effective for all learning styles in a training course

4. Design and conduct training activities that appeal to a variety of learning styles

Materials:

❑ Long piece of masking tape, string or rope

❑ Slide presentation: Adult Learning Styles

❑ Reference manual

❑ Items for dividing participants into groups

❑ Worksheet: Reproductive Health Training Activities for Different Learning Styles

❑ Optional: Prizes for winning group members

Advance Preparation:

❑ Place a long piece of masking tape, string or rope in a line on the floor from one side of the room to the other

❑ Prepare and copy slides and participant handouts

❑ Write the four adult learning styles on index cards (one on each card)

❑ Copy worksheet: Revise Reproductive Health Training Activities for Different Learning Styles worksheet (optional: list reproductive-health training topics that are more tailored to the learners' local contexts)

Total Time: 1 hour 40 minutes

Instructions:

5 minutes

1. Introduce the session: Adult Learning Styles.

● Discuss the importance of understanding adult learning styles:

❍ Every adult has the capacity to learn, but adults learn in different ways.

❍ Training presents a unique opportunity for adults to learn additional information, adopt different attitudes or gain new skills. Trainers should design a training course employing a variety of methods that facilitate learning for all participants.

❍ Some adults learn through experience and some through observation. Some adults grasp new concepts by hands-on experimenting and innovating on their own and others prefer to conduct a step-by-step analysis.

❍ While most people have a preferred approach to learning, in some cases the specific learning situation may influence how people learn best.

❍ When planning a training course, it is important to be as responsive to as many different learning styles as possible so that there is an opportunity for everyone to learn effectively.

2. Facilitate activity: Cross the Line, designed to help participants get a better understanding of different adult learning styles.

● Explain the activity.

❍ Ask all participants to stand on one side of the line you placed on the floor using masking tape, string or rope.

❍ Explain that you will read aloud a series of four statements. The first statement is about an everyday learning situation, and the other three are about reproductive health.

❍ Read the statements one at a time. After you read each statement, tell participants that if the statement you just read describes them, they should cross the line. If it doesn't describe them, they should stay where they are.

❍ Once some people have crossed the line, give participants an opportunity to observe who crossed the line and who did not.

❍ Then discuss participants' responses to each statement, first hearing from someone who crossed the line and then from two people who did not.

Note to trainers: As you read each statement, allow enough time for learners to decide whether or not the statement describes them and to move across the line or stay where they are. You might want to read each statement twice slowly to allow learners to really understand the statement.

● Read the statement twice and then process it.

When I need to use a piece of equipment that I have never used before (radio, cellular phone, VCR), the first thing I do to learn how to use it is to study the instruction manual.

❍ Pause to allow some people to cross the line and give participants time to observe who crossed the line and who did not.

❍ Explain that whoever crossed the line likely learns best through analysis. Ask someone who crossed the line: *Please briefly share your experience with learning through analysis.* (Encourage participant to only take a minute.)

❍ Ask to hear from someone who stayed in place because she or he learns how to use a new piece of equipment a different way. (Again, encourage participant to only take a minute to explain.)

❍ Ask to hear from another person who didn't cross the line who has a third way of learning how to use a new piece of equipment.

● Ask all participants to return to the same side of the line.

● Read the second statement twice and then process it.

When I am trying to learn new information, for example facts about maternal morbidity, I learn best by lecture or by watching a video about it.

❍ Pause to allow some people to cross the line and give participants time to observe who crossed the line and who did not.

❍ Explain that whoever crossed the line likely learns best through observation. Ask someone who crossed the line: *Please briefly share your experience with learning by observation.*

❍ Ask to hear from someone who stayed in place because he or she learns information a different way. (Encourage only those participants who have a different learning style to share.)

● Ask all participants to return to the same side of the line.

● Repeat the same process with the third statement.

When I am trying to learn better ways of relating to and communicating with my clients, I learn best by first discussing the issues and practicing with other people.

❍ Explain that whoever crossed the line likely learns best through first experiencing it with other people. Ask someone who crossed the line: *Please briefly share your experience with learning a new skill by first experiencing it with other people.*

❍ Ask to hear from someone who stayed in place because she or

he gains new skills a different way.

● Repeat the same process with the fourth statement.

When I am learning a new skill at work, for example using a new computer program, I learn best by trying out different things on my own until I'm able to use it correctly.

   ❍ Explain that whoever crossed the line likely learns best through innovation. Ask someone who crossed the line: *Please briefly share your experience with learning a new skill by trial and error on your own.*

   ❍ Ask to hear from someone who stayed in place because she or he learns new skills a different way.

● Thank learners for their participation and ask them to return to their seats. Process the activity by asking one or two learners to share their responses to each of the following questions:

   ❍ *What did you learn from this activity?*

   ❍ *As trainers, what does this activity tell us we need to remember when we are designing and delivering training courses?*

● Summarize activity:

   ❍ As participants demonstrated in the above activity, in every group there are a variety of adult learning styles, all of which need to be accommodated within a training course design.

   ❍ Sometimes preferred learning styles may vary even within the same person, depending on what it is they're learning.

   ❍ Each training group will probably have a different configuration of learning styles. It is usually not possible to know the exact learning styles of your training audience in advance. The trainer therefore needs to use a variety of training methods appropriate for all four styles that will enable every participant to learn effectively.

3. Show slide presentation: Adult Learning Styles. Give a short lecture summarizing the key characteristics of each of the four adult learning styles.

   ● Show slide: Experiencers. In the Cross the Line activity, experiencers are the people who preferred to learn new client interaction skills by discussing and role-playing with other people. The heart symbolizes this learning style. People who prefer to learn this way tend to:

      ❍ Be receptive

      ❍ Like experience-based learning

      ❍ Be people-oriented and empathetic

30 minutes

❍ Make feeling-based judgments

❍ Be oriented toward their peers

❍ Like feedback and discussion

❍ Lead with their hearts

❍ See each situation as unique

❍ Do not like a theoretical approach

❍ Ask "Why?"

● Show slide: Experiencers' Learning Strengths and explain that these individuals learn by experiencing, relating to people and being sensitive to people and feelings. For experiencers, the preferred roles of the trainer are coach and helper.

● Ask learners: *What types of training methods or activities do you think will work best for this type of learner?*

● Allow time for participants to suggest several, then show slide: Training Activities for Experiencers and add to their responses from the following list:

❍ Games

❍ Role plays

❍ Brainstorming

❍ Interviews

❍ Discussion

❍ Hands-on exercises

● Show slide: Observers. These are the people from the Cross the Line activity who learned maternal morbidity facts best from lecture or video. The eye symbolizes this learning style. People who prefer this way of learning tend to:

❍ Reflect and be tentative

❍ Observe what's going on carefully

❍ Use what works

❍ Like to get to the point

❍ Use plans and timelines

❍ Be introverted

❍ Prefer lectures and observation

❍ Use strategic thinking processes

❍ Like practical application

❍ Ask "How does it work?"

● Show slide: Observers' Learning Strengths. Explain that the strengths of these individuals include carefully observing before making judgments, viewing issues from different perspectives and looking for the meaning of things. For the observers, the preferred role of the trainer is guide or task master.

● Ask learners: *What types of training activities do you think will work best for this type of learner?*

● Allow time for several participants to respond, then show slide: Training Activities for Observers. Add to their responses from the following list:

❍ Lectures

❍ Demonstrations

❍ Videos

❍ Visual aids

❍ Modeling

❍ Exhibits

❍ Instruments

● Show slide: Innovators. These are the people from our Cross the Line activity who try out different things until they learn how to use a new computer program correctly. The hand symbolizes this learning style. People who prefer this way of learning tend to:

❍ Like to be engaged and doing something

❍ Enjoy self-discovery

❍ Be open to all kinds of possibilities

❍ Be flexible

❍ Be risk-takers

❍ Like to experiment with new things

❍ Be extroverts

❍ Dislike passive learning

❍ Ask "If?"

● Show slide: Innovators' Learning Strengths. Explain that the strengths of these individuals include showing their ability to get things done, taking

risks and acting to influence people and events. For innovators, the preferred role of the trainer is role model.

● Ask learners: *What types of training activities do you think will work best for this type of learner?*

● Allow time for participants to suggest several, then show slide: Training Activities for Innovators. Add to their responses from the following list:

   ❍ Projects

   ❍ Role plays

   ❍ Hands-on, experimental exercises

   ❍ Action plans

● Show slide: Analyzers. These are the people who, in our Cross the Line activity, read the instruction manual to learn how to use a new piece of equipment. The head/mind symbolizes this learning style. People who prefer this way of learning tend to:

   ❍ Be analytical

   ❍ Use logic and like to analyze

   ❍ Think in sequences

   ❍ Pay attention to details

   ❍ Like certainty

   ❍ Be oriented toward symbols and ideas

   ❍ Be authority oriented

   ❍ Prefer impersonal learning

   ❍ Dislike activities

   ❍ Ask "What?"

● Show slide: Analyzers' Learning Strengths and explain that the strengths of these individuals include logical analysis of ideas, systematic planning and deductive thinking. For the Analyzer, the preferred role of the trainer is as communicator of information.

● Ask learners: *What types of training activities do you think will work best for this type of learner?*

● Allow for group brainstorming, then show slide: Training Activities for Analyzers. Add to their responses from the following list:

   ❍ Lectures

   ❍ Case studies

❍ Readings

❍ Journaling

❍ Visualization

❍ Programmed instruction

❍ Symbolic art

● Ask learners to refer to page 15 of the reference manual to see the handout: Adult Learning Styles, which summarizes the information just discussed.

Now that we have a better understanding of different learning styles and the activities to which they respond best, we should be able to plan training courses that include activities for every learning style so that there is an opportunity for everyone to learn effectively.

4. Explain the small-group skills practice activity first, then have learners divide into groups and move into different areas of the room to prepare.

20 minutes

● Creatively divide participants into four small groups (see *Using this Manual* for more information).

● Have groups go to different areas of the room and give each group a card with one of the four adult learning styles written on it. Each group is going to design a training activity to teach an everyday skill for their assigned learning style and then act it out in front of the large group. The rest of the groups will guess the learning style for which the activity is designed.

❍ All four groups have the same everyday skill. For example, train the group how to plant a tree, milk a cow, ride a bike or bake bread. Select a skill that is commonly held by most people in that setting.

● Give each group 10 minutes to design their training activity.

● One by one, have groups demonstrate their activity in front of the larger group.

❍ Ask the larger group to guess which learning style the activity was designed for.

❍ Once the other groups guess the learning style, have the large group brainstorm what other activities that group could have chosen for that learning style.

❍ Thank the group for their activity and ask other group members to applaud them.

❍ Optional: Give a prize to the group that guesses the most learning styles first.

5. Explain that this next activity is to help learners practice selecting different reproductive-health training activities for all learning styles.

- Give learners worksheet: Reproductive Health Training Activities for Different Learning Styles. Advise learners to refer to information on *Adult Learning Styles* (pages 14-15) and the *Overview of Training Methods* (pages 60-61) in their reference manuals for this activity.

- As a large group, discuss each reproductive-health training topic on the worksheet and, one learning style at a time, fill in possible activities that would be conducive to that learning style.

  - Optional: Save time by only covering the most relevant training topics for that setting and audience. If you only cover some, ensure that you have covered topics aimed at increasing knowledge, changing attitudes and attaining skills.

  - Ensure that learners' suggestions are appropriate and indicate a true understanding of each learning style.

  - Advise learners that they can refer to this worksheet when they are designing training courses in the future.

6. Close the session

- Ask learners: *What other comments and questions do you have about adult learning styles?*

7. Link to next session.

While catering to different learning styles is an important aspect of training design and delivery, just as important are the characteristics that make trainers effective.

Reproductive Health Training Activities for Different Learning Styles

Training topics to be covered:	Training activities that are effective for:			
	Experiencers	Innovators	Observers	Analyzers
Knowledge				
Maternal mortality ratios for each country in the region				
Contraceptive prevalence rates				
Reproductive-health quality-of-care indicators				
Attitudes				
Maintaining an open, non-judgmental attitude toward clients				
Attitudes about abortion laws				
Challenging beliefs about HIV-positive clients' sexual behaviors				
Skills				
Performing manual vacuum aspiration (MVA)				
Conducting abortion counseling				
Setting sexual violence screening protocols				
Monitoring the implementation of new clinical guidelines				
Respectful interaction and communication with adolescent clients				

Purpose:

The purpose of this session is to provide an overview of the characteristics of effective trainers and to allow learners the opportunity to reflect on their strengths and weaknesses as trainers and identify those areas in which they would like to improve.

Objectives:

At the end of this session, learners will be able to:

1. Describe characteristics of effective trainers

2. Identify concrete skills that enable trainers to be effective

3. Identify their own strengths and areas for improvement as trainers

Materials:

❏ Flipchart or other large piece of blank paper

❏ Markers

❏ Masking tape

❏ Index cards of two different colors

❏ Reference manual

❏ Trainer's Self-Assessment Tool

Advance Preparation:

❏ Place the cards on the tables (each learner needs one card of each color)

❏ Prepare flipchart: Trainer Characteristics with two columns titled "positive" and "negative"

❏ Prepare pieces of tape for participants to post cards on the flipchart

Total Time: 50 minutes

Instructions:

1. Introduce the session: Characteristics of Effective Trainers.

● Explain to learners that:

During this session, we will discuss the roles and characteristics of effective trainers, assess our strengths and weaknesses as trainers and examine ways in which each of us can improve our skills.

2. Discuss past experiences with effective and ineffective trainers.

- Ask learners to reflect on different training courses in which they have participated. Do they remember a certain trainer who was very effective? What about this particular trainer made her or him so effective?

- After giving learners a moment to think, ask them to write down one positive characteristic of this trainer on a note card of a certain color.

- Ask learners to think about a trainer who was not very effective. After a moment, ask the learners to write down a negative characteristic of this trainer on the note card of the other color.

- Ask learners to share their cards with the group.

- Post flipchart: Trainer Characteristics in a place that is visible to all learners.

- Explain that you would like eight volunteers to share their cards with the group. Four volunteers will share cards with positive characteristics and four will share negative characteristics.

- Tell learners that you would like volunteers to come to the front of the room one at a time, hang a card in the appropriate column (positive or negative) and briefly tell the group a little about the characteristic they have chosen.

When you hang your card on the flipchart, please tell the group why you chose this characteristic. What about this characteristic made the trainer effective or ineffective?

  - ❍ Allow each learner no more than one minute to talk about their card.

3. Summarize positive characteristics of effective trainers.

- Read aloud the positive characteristics that have been posted on the flipchart.

- Refer learners to page 17 of their reference manual for a list of *Characteristics of Effective Trainers*.

- Ask 10 volunteers to each select and read one characteristic from the list and give a very brief example of when they have seen this characteristic in action in an effective trainer.

Note to trainers: If participants have additional characteristics to add that are not duplicative, welcome their additions. However, do not spend too much time including additional characteristics.

4. Ask learners to reflect on and assess their own strengths and weaknesses as trainers.

- Distribute the Trainer's Self-Assessment Tool and instruct learners to take five minutes to complete it.
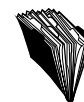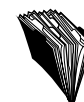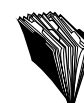
● Ask learners to write check marks next to the characteristics they already possess and, at the end, list their three biggest strengths from the list and three areas they would like to improve.

● Ask learners to turn to the person next to them and for five minutes discuss their three strengths and weaknesses as trainers.

5 minutes

5. Summarize the session.

● Thank learners for their honest self-assessments.

● Remind learners that even the most experienced trainers can always improve their skills.

● Express your hope that everyone has identified strengths they can share with other learners during the training course, as well as areas in which they would like to improve.

● Encourage learners to proactively seek opportunities during the training course to practice their skills and get constructive feedback from the trainers and other learners to help them strengthen the areas they would like to improve.

6. Link to the next session.

Now that we have covered all of the characteristics of effective trainers, in the next session we will discuss some in more detail, specifically effective communication.

Trainer's Self-Assessment Tool

_____ You know your subject matter. You have studied your topic and have experienced the events about which you speak. You are perceived as credible by learners.

_____ You know your audience. You respect and listen to learners. You call them by name, if possible.

_____ You are neutral and nonjudgmental. You validate everyone's experience and their right to their own perspective. You respect differences of opinion and life choices.

_____ You are culturally sensitive. You are aware that your own views and beliefs are shaped by your cultural background just as your learners' culture shapes their perspectives.

_____ You are self-aware. You recognize your own biases and "hot-buttons" (topics that arouse strong reactions in you) and act in a professional manner when your "hot-buttons" are pushed.

_____ You are inclusive. You encourage all learners to share their experiences and contribute to the group learning process in their unique ways.

_____ You are lively, enthusiastic and original. You use humor, contrasts, metaphors and suspense. You keep your listeners interested and challenge their thinking.

_____ You use a variety of vocal qualities. You vary your pitch, speaking rate and volume. You avoid mono-tones.

_____ You use "body language" effectively. Your body posture, gestures and facial expressions are natural and meaningful, reinforcing your subject matter.

_____ You make your remarks clear and easy to remember. You present one idea at a time and show relationships between ideas. You summarize when necessary.

_____ You enhance with illustrations. You use examples, charts, and visual and audio aids to illustrate your subject matter.

_____ You understand group dynamics and the stages all groups go through. You are comfortable with conflict resolution.

_____ You are flexible. You read and interpret your learners' responses — verbal and nonverbal — and adapt your plans to meet their needs. You are in charge without being overly controlling.

_____ You are open to new ideas and perspectives. You are aware that you don't know all the answers. You recognize that you can learn from learners as well as offer them new knowledge or perspectives.

_____ You are compassionate. You understand that much of the material may have an emotional impact on learners. You are empathetic and understanding about learners' emotional reactions.

_____ You are interested in evaluating your work. You encourage co-trainers and learners to give feedback. When you receive negative feedback, you critically analyze it instead of becoming defensive.

_____ You continuously work to improve your performance. You seek out opportunities to learn new skills and use negative feedback as an opportunity to improve.

My three biggest strengths from the list above are:

1. _____

2. _____

3. _____

Three areas from the list above in which I would like to improve are:

1. _____

2. _____

3. _____

Effective Communication Skills

Purpose:

The purpose of this session is to identify techniques for effective verbal and nonverbal communication during a training course, and to practice employing these techniques to demonstrate interest in and respect for learners' contributions and ensure that learners comprehend key information.

Objectives:

At the end of this session, learners will be able to:

1. Explain why good communication is an important skill for trainers

2. Identify characteristics of effective verbal and nonverbal communication

3. Recognize poor communication skills

4. Demonstrate effective communication skills, including effective nonverbal communication and the use of open-ended questions

Materials:

❑ Flipchart

❑ Markers

❑ Tape

❑ Reference manual

❑ Communication Skills Checklist

❑ Handout: Lecture on Condom Use Script for Trainer

❑ Handout: Lecture on Condom Use Script for Small Groups

❑ Items for dividing participants into groups

Advance Preparation:

❑ Label flipchart: Effective Nonverbal Communication

❑ Label flipchart: Effective Verbal Communication

❑ Prepare flipchart: Examples of Closed-Ended Questions

❑ Prepare flipchart: Examples of Open-Ended Questions

❑ Prepare flipchart: Examples of Paraphrasing

❑ Prepare Lecture on Condom Use: Script for Trainer Demonstrating Poor Communication Skills (optional: adapt the Trainer's Script using a topic more relevant to the training course)

❑ Copy handout: Lecture on Condom Use Script for Small Groups

❑ Copy handout: Communication Skills Checklist

Total Time: 55 minutes

1. Introduce the session: effective communication skills.

● Facilitate brainstorming activity on nonverbal and verbal communication trainers use to encourage open communication and facilitate learning.

> *To work effectively with adult learners, trainers need to be skilled communicators. Trainers use effective verbal and non-verbal communication to demonstrate interest in and respect for learners' diverse contributions, manage group conflict, facilitate learning and ensure that learners comprehend key information.*

● Post flipchart: Effective Nonverbal Communication.

● Ask participants to identify nonverbal communication trainers use to encourage open communication and facilitate learning. Define nonverbal communication as silent communication through physical posture or body language, facial expressions and gestures. Write their comments on the flipchart. Add from the following list as needed:

  ❍ Maintaining eye contact.

  ❍ Nodding head or smiling to demonstrate interest in what is being said.

  ❍ Standing in front of learners without placing any barriers, such as a desk or podium, between themselves and learners.

  ❍ Standing in relaxed yet confident postures.

  ❍ Demonstrating enthusiasm about the topic by moving around the room and gesturing.

  ❍ Avoiding distracting movements, such as tapping feet, pacing back and forth, or passing out handouts while someone is speaking.

● Note that effective trainers also pay attention to learners' nonverbal communication.

  ❍ People's body language may indicate that they are uncomfortable discussing a certain topic or are bored or distracted.

● Post flipchart: Effective Verbal Communication.

● Ask participants to identify verbal communication trainers use to encourage open communication and facilitate learning. Write their comments on the flipchart and then add the following if they have not already been mentioned by learners:

  ❍ Varying the pitch, tone and volume of voice.

  ❍ Speaking clearly.

❍ Encouraging questions.

❍ Avoiding becoming defensive when learners challenge them.

❍ Allowing learners to answer each other's questions.

❍ Emphasizing important points.

❍ Summarizing at the end of an important point.

❍ Avoiding repetitive phrases such as, "OK?" "Right?" "Do you understand?" or "Is that clear?"

❍ Making smooth transitions from one topic to another.

❍ Making connections between various topics, when possible.

❍ Giving clear directions by posting written directions in a visible place.

❍ Using language that is easily understood and is culturally acceptable to the learners.

● Refer learners to pages 18-19 of their reference manual for more information about effective nonverbal and verbal communication.

2. Discuss key communication techniques, including the effective use of closed- and open-ended questions and paraphrasing.

● Ask learners for an example of a closed-ended question. Ensure the example is correct, and then discuss closed-ended questions.

❍ Closed-ended questions elicit short answers, often "yes" or "no."

❍ They can be used to check in with the group, for example, to find out whether or not they understand the material or are ready to move to the next topic.

❍ Closed-ended questions can also be useful when the trainer is trying to uncover specific information or make a point.

❍ Closed-ended questions are not useful when trainers are trying to solicit in-depth responses from learners or to initiate discussion.

● Post and read flipchart: Examples of Closed-Ended Questions.
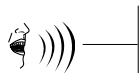
❍ *Is the meaning of that word clear?*

❍ *Do the practitioners in your facility mainly use surgical techniques?*

● Ask learners for an example of an open-ended question. Ensure the example is correct, and then discuss open-ended questions.

❍ Open-ended questions elicit in-depth responses, thus engaging learners more fully in discussions and activities.

❍ Open-ended questions begin with "how," "what," "when" and "tell me about."
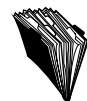
❍ They do not have a "yes" or "no" answer.

● Post flipchart: Examples of Open-Ended Questions.

❍ What skills are you hoping to learn during this training session?

❍ Tell me some possible reasons why this problem is occurring.

● Ask learners to explain "paraphrasing." Ensure the explanation is correct, and then discuss use of paraphrasing.

❍ Paraphrasing, or restating what someone has said to you, is an effective way to make sure that you and the speaker understand each other.

❍ It shows that you are listening carefully to what is being said.

❍ If you have misunderstood, speakers have an opportunity to clarify the point they were trying to communicate.

● Post flipchart: Examples of Paraphrasing.

❍ What I hear you saying is that you're not getting the support you need from the health ministry to make these changes. Is this correct?

❍ In other words, you find that women are often reluctant to discuss these topics with a male doctor?

● Refer learners to pages 19-20 in their reference manual for more information on closed- and open-ended questions and paraphrasing.

● Link to next section of the session.

Now that we have identified effective nonverbal and verbal communication, open and closed-ended questions, and paraphrasing, we are going to complete an activity that will allow us to see examples of both effective and ineffective communication, as well as practice using effective communication techniques.

3. Discuss and practice more effective communication skills.

● Perform the skit demonstrating poor communication skills with learners observing and taking notes on the Communication Skills Checklist.

❍ Explain to the group that the trainer will perform a skit demonstrating poor communication skills, both verbal and nonverbal. Afterwards, learners will break into smaller groups to discuss what could be improved and then improve the skit using effective communication techniques.

❍ Distribute the Communication Skills Checklist on which participants will take notes.

❍ Perform the skit using the Lecture on Condom Use: Script for Trainer Demonstrating Poor Communication Skills.

● In small groups, discuss the ineffective communication skit and then improve it using more effective communication techniques.

    ❍ Use a creative way to divide participants into small groups of four or five participants (see *Using this Manual* for more information).

    ❍ Distribute copies of Lecture on Condom Use Script for Small Groups to each group.

    ❍ Ask each group to spend about five minutes referring to their Communication Skills Checklist and discussing ways that the person playing the role of trainer in this skit could have communicated more effectively.

    ❍ Using these suggestions, ask each group to select a group member to perform the skit again in their small group, this time using more effective communication techniques.

● Discuss the skit and small-group discussions as a large group using the following questions.

Which types of ineffective communication were the most obvious to detect? Some answers might include:

    • Used judgmental terms like "should" and "always."

    • Made assumptions about audience's definition of sex; biased towards heterosexual, vaginal sex only.

    • Presented many ideas at once; no summarizing or check-in for audience understanding.

    • Didn't include audience by making eye contact and asking questions.

    • Was not familiar enough with information; read from a script.

    • Put learners on the spot by asking opinion on personal subject.

    • Interrupted learner after asking for opinion.

    • Inserted own opinions.

    • Didn't link topics together or provide smooth transition.

❍ *When groups performed the skit using more effective communication techniques, what were some of the changes they made?*

❍ *What might be some results of not using effective communication skills in training courses?* Answers might include:

• Alienating your audience.

• Neglecting important take-home messages.

• Audience not comprehending the information.

• Information not relevant to the audience.

4. Summarize the importance of effective communication.

● Key points:

❍ Effective trainers employ good communication skills to facilitate learning, manage tension and conflict, and maintain a positive and productive learning environment.

❍ Skilled trainers use verbal and nonverbal communication to demonstrate interest in and respect for learners' contributions, and to interpret nonverbal cues that learners provide about their comfort and satisfaction with the training course.

❍ Successful trainers acknowledge the value of different perspectives, while diplomatically testing and challenging learners' assumptions and prejudices.

❍ Effective trainers are skilled at providing productive, positive feedback to learners and respond non-defensively to learners' feedback.

● Remind learners that this information is in the reference manual in more detail on pages 16-21.

5. Link to next session.

Now that we have discussed and practiced effective communication skills, let's talk more about the different ways to create a productive learning environment.

L e c t u r e   o n   C o n d o m   U s e
Script for Trainer Demonstrating Poor Communication Skills

Set up:

❍ Begin by standing behind a podium or desk. Skit should be performed from this spot (don't move around the room).

❍ Have papers scattered all over the desk.

❍ Read from the script and avoid making eye contact with participants.

❍ Don't check in to see if participants understand; ignore them if participants raise their hands.

❍ Have a few notes written in small handwriting with yellow (or other light, difficult to see from a distance) marker on flipchart placed too low on the wall.

Poor nonverbal communication skills trainer could use:

❍ Slouch or lean heavily on the desk.

❍ Tap feet or fingers while talking.

❍ Fidget with hair, papers, etc.

❍ Look at watch or clock.

❍ Look at notes or behind you at flipchart (with back to participants) most of the time.

❍ Search through your bag or purse during your presentation.

Trainer reads the following script (speak in monotone voice; read all at once and don't ask questions or stop to clarify anything): *To protect yourself against STIs, you should ALWAYS use a condom before sex. To use a condom correctly, pinch the end to get the air out prior to placing it on the head of the erect penis. This pinched-off space will be where the ejaculate collects and minimizes the risk of bursting the condom. Roll the condom down the shaft of the erection, covering as much skin as possible (many STIs can spread from skin-to-skin contact even if there are no open sores or rashes present). The condom must be unrolled onto the erection before the penis enters the vagina, as it is common to leak a small amount of semen prior to ejaculation. If you guys are not using a lubricated condom, you should put K-Y jelly on the erection to lubricate and hence minimize the risk of tearing the condom during sexual relations. [Pretend to lose your place and pause for a long time]. Never use Vaseline (petroleum jelly) or other oil-based products on the condom. When withdrawing the condom-covered penis from the vagina, be sure to hold on at the base to prevent it from slipping off and spilling semen.*

Trainer to participant (call on someone in the group; don't ask for volunteers): *What do you think is the best condom to use?*

Trainer: (interrupt participant): *Are you SURE about that? My opinion on the matter is that any condom is better than no condom. Well, I'm sorry, but we're running out of time so we need to leave this issue behind and move on to reproductive health.*

END.

L e c t u r e   o n   C o n d o m   U s e
Script for Small Groups

Trainer script (should be revised to be more effective):

To protect yourself against STIs, you should ALWAYS use a condom before sex. To use a condom correctly, pinch the end to get the air out prior to placing it on the head of the erect penis. This pinched-off space will be where the ejaculate collects and minimizes the risk of bursting the condom. Roll the condom down the shaft of the erection, covering as much skin as possible (many STIs can spread from skin-to-skin contact even if there are no open sores or rashes present). The condom must be unrolled onto the erection before the penis enters the vagina, as it is common to leak a small amount of semen prior to ejaculation. If you are not using a lubricated condom, you should put K-Y jelly on the erection to lubricate and hence minimize the risk of tearing the condom during sexual relations. Never use Vaseline (petroleum jelly) or other oil-based products on the condom. When withdrawing the condom-covered penis from the vagina, be sure to hold on at the base to prevent it from slipping off and spilling semen.

Trainer to participant *What other information can you add about condom use?*

Allow participant to answer.

Trainer: *Thank you for contributing more information. Well, I'm sorry, but we're running out of time so we need to leave this issue behind and move on to other health topics.*

END.

Communication Skills Checklist

For each item described below, write a check (✔) in the Yes (Y) column if the person demonstrating effective communication exhibits the skill or in the No (N) column if the person does not. In the comments column, record specific examples or suggestions to be shared in the feedback session.

Item	Y	N	Comments
Open-Ended Questions Uses open-ended questions to encourage participation			
Paraphrasing Restates learners' comments to show that the facilitator is listening			
Nonjudgmental Remains neutral and nonjudgmental; validates everyone's experiences and opinions			
Body Language & Voice Uses body posture, gestures, facial expressions and vocal qualities that are natural, interesting and reinforce subject matter			
Articulate Remarks are clear and easy to remember; presents one idea at a time; summarizes			
Culturally Sensitive Respects learners' cultural backgrounds and perspectives			
Inclusive Encourages all learners to share experiences and contribute to the group learning process			
Aware of Learner Needs Checks in regularly with learners to ensure that needs are being met			

Adapted from the American Red Cross, Basic HIV/AIDS Program: Fundamentals Guide for Training Instructors. Falls Church, VA: American Red Cross; 1997.

Purpose:

The purpose of this session is to underscore the importance of creating a training environment that is emotionally safe, physically comfortable and conducive to learning. Learners will discuss concrete strategies for creating a productive learning environment.

Objectives:

At the end of this session, learners will be able to:

1. Describe ways to create a physically comfortable training environment

2. Identify ways to help learners feel emotionally safe during a training course

3. Explain why and how trainers use group norms

4. Explain why and how trainers use a parking lot

Materials:

❏ Flipchart

❏ Markers

❏ Training toys (colored pipe cleaners, modeling clay, stress balls and other toys)

❏ Reference manual

❏ *Training Course Overview:* Possible Group Norms

Advance Preparation:

❏ Prepare flipchart: What Appealed to Your Senses? Label five columns Sight, Smell, Hearing, Touch and Taste

❏ Label flipchart: Creating a Physically Comfortable Environment

❏ Label flipchart: Ways to Make Learners Feel Emotionally Safe

Total Time: 30 minutes

> **Note to trainers:** Ideally, you would schedule this session at the end of the first day of a training course.

Instructions:

1. Introduce the session: Creating a Productive Learning Environment.

   ● Explain to learners that:

      ❍ Adults learn best when the training environment is affirming and comfortable, meaning that people feel physically at ease, emotionally safe, and open and ready to learn.

2. **Discuss the importance of creating a physically comfortable training environment for learners.**

● Explain that when trainers consider physical comfort, they should think about ways to appeal to the five senses: sight, smell, hearing, touch and taste.

● Post flipchart: What Appealed to Your Senses? Ask learners to name the things the trainers did during the day that appealed to their five senses. Write the comments down on the flipchart in the appropriate columns.

● Post flipchart: Creating a Physically Comfortable Environment. Ask participants to share what things the trainers did during this training course or things they have seen trainers do in other courses to create a physically comfortable space for learners. Add from the list below:

  ❍ Use a room with windows that allows for natural light and a view of the outside world.

  ❍ Use a room that is quiet, without exposure to outside noise or distractions.

  ❍ Make sure the room has adequate lighting and good acoustics.

  ❍ Decorate the room with wall hangings, flowers and tablecloths (especially items indigenous to the location of the training course) to make the room more pleasant and help participants feel more at home.

  ❍ Make sure room temperature can be controlled and is at a comfortable setting.

  ❍ Play soft music as learners enter the training room, during breaks and while doing reflective activities.

  ❍ Infuse the room with fresh flowers, scented oils or other natural, pleasant odors (it may be important to check with participants to make sure no one has allergies to specific scents).

  ❍ Use chimes or simple musical instruments as a way to bring learners back together from breaks or small-group activities.

  ❍ Use colorful markers that are easy to see from a distance when writing on flipcharts.

  ❍ Have candies, snack food and water available for learners at the beginning of and throughout the training course.

  ❍ Have pipe cleaners, modeling clay, stress balls and other toys on the tables where participants are seated to enable kinesthetic learners (people who learn best through touch and movement) to keep their hands busy while listening and participating (see *Using this Manual* for more on training toys).
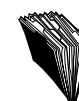
❍ Avoid putting objects that make noise or are otherwise distracting on the tables.

❍ Set up chairs and tables to create a physical environment that is conducive to learning and interaction.

● Explain that the physical arrangement of learners and furniture in the room will affect the interaction and communication that occur among members of a training group.

❍ Trainers may rearrange the furniture during the training day to facilitate different training activities and meet learners' needs.

● Refer learners to the room set-up descriptions in the reference manual on page 26 and discuss the benefits and drawbacks of each arrangement:

❍ Circle Seating: learners and trainer sit in one circle.

❍ U-Shape Seating: learners make a "U" shape, with the trainer in the front and center.

❍ Workshop Clusters: learners sit in groups at various tables; the trainer may move between groups at each table.

❍ Standard Classroom Seating: learners sit in rows facing the front, the trainer faces the group from the front of the room.

● Provide examples for how the room arrangement may need to vary based on the training methods used.

❍ A session using anatomic models will need an arrangement that allows one or more learners to work on each model comfortably.

❍ A group discussion will require learners to be able to see and talk to each other easily.

● Ask learners to share other examples of training methods or activities and which room arrangements are most conducive to them.

● As you close the discussion about physical comfort, explain to learners that like the room furniture, many aspects of the physical environment can be altered each day.

❍ Alter the table toys or snacks each day to keep the training room interesting and increase the likelihood of meeting all learners' needs over the entire training course.

❍ Choose different music to play during transitions.

❍ Change the wall hangings to include learners' projects from previous activities.

3. Discuss emotional safety as another essential part of a positive learning environment.

● Explain that for learners to feel emotionally safe in a training environment, they need to know what to expect from the training course and what is expected from them as learners.

❍ When trainers consider learners' emotional comfort and safety, they should think about potential barriers to learners' full participation and then devise ways to remove those barriers.

● Post flipchart: Ways to Make Learners Feel Emotionally Safe. Ask learners what trainers can do to make a group feel emotionally safe and write their ideas down on a flipchart. Add from the list below, as necessary:

❍ Review the training course goals and objectives.

❍ Provide an overview of the agenda, including stop and start times and times for breaks and meals.

❍ Explain the trainer's role during the training course (for example, as a facilitator rather than an expert speaker or presenter).

❍ Explain the learners' role during the training course (for example, as active contributors to group discussions and activities). Trainers should emphasize that the learners have a lot of wisdom to share with the group and that everyone will be greatly enriched if people participate fully in the discussions and activities.

❍ Let the group know where they can take care of their basic needs (for example, the location of restrooms, telephones, and places to obtain food and drink).

❍ Have participants create and commit to group norms (also called ground rules) to set the parameters for how the group will function together. One of the most important group norms to help participants feel comfortable sharing their experiences openly is confidentiality.

❍ Use the parking lot (you may rename this) to convey to learners that you value their questions and comments, even when they are off-topic.

● After the group has finished brainstorming, spend a few moments to reflect on the rationale for group norms and the parking lot.

● Refer learners to the group norms they set during the *Training Course Overview* and review the rationale for group norms.

❍ Group norms are guidelines that help create a safe environment and enable tasks to be accomplished efficiently.

❍ Creating and agreeing on group norms at the beginning of a training course helps avoid potentially disruptive dynamics during the training course.

❍ It may be helpful for the trainer to suggest the first few group norms (selecting norms that usually every training group would include) and then ask the group for additional ones. The trainer should have learners develop their own group norms that reflect what is important for them to feel safe.

❍ The trainer should address any concerns learners have about the group norms and then ask for people to commit to following them throughout the training course.

Can we all agree to follow these group norms? Is there anyone who cannot agree? Then these are our norms.

❍ The trainer should post the group norms in a visible place throughout the training course to allow learners to see them at all times. The trainer can refer to them, if necessary, during the training course.

● Provide examples of group norms. (Refer to *Training Course Overview: Possible Group Norms.*)

● Refer learners to the parking lot you introduced during the *Training Course Overview*, which may now have a number of topics listed on it, and review the rationale for the parking lot.

❍ Another way to ensure emotional safety is to create a system for putting aside comments, concerns or questions that will not be immediately addressed during a training course. Explain to learners that this may be called a parking lot, parking bay, training drawer, training pot or another name.

❍ Explain that often learners bring up important issues that are slightly off the topic being discussed at the time. Creating a system for recording these issues and comments ensures that learners' contributions are acknowledged and valued, while preventing these comments from derailing a course.

❍ Describe how trainers should use a parking lot: explain the purpose to learners at the beginning of a course, add learners' comments to the list throughout the course, and take time at the end of each day to review the parking lot. At this time the group discusses whether they want to include the topic in the training course and, if so, when they would like to address it. Trainers will make changes to the agenda to include the topics participants have decided to include.

❍ Due to time constraints, sometimes trainers will have to ask participants to choose one topic over another.

4. Summarize the session.

During this session, we discussed the importance of creating a training environment that is emotionally safe, physically comfortable and conducive to learning. We discussed concrete strategies for creating a productive learning environment.

5. Link to next session.

Now that we have clear strategies for creating an inviting training environment, we will move on to managing group dynamics.

Managing Stages of Training Group Dynamics

Purpose:

The purpose of this session is to make learners aware of the stages of training group development that take place during a course and how the stages affect learning. Participants will also learn to identify strategies for managing training group dynamics to create a supportive learning environment.

Objectives:

At the end of this session, learners will be able to:

1. Explain stages of training group development

2. Describe learner characteristics at each stage of group development

3. Articulate appropriate strategies for trainers to manage group dynamics

Materials:

❑ Slide presentation: Managing Stages of Training Group Dynamics

❑ Worksheet: Managing Stages of Training Group Dynamics

Advance Preparation:

❑ Prepare and copy slides and participant handouts

❑ Copy worksheet: Managing Stages of Training Group Dynamics

Total Time: 45 minutes

Instructions:

1. Introduce the session: Managing Stages of Training Group Dynamics.

   ● Show slide: Managing Stages of Training Group Dynamics.

      ❍ Any time a group of people comes together as a learning community, such as in a training course, they will experience a series of predictable interpersonal stages of development.

      ❍ As a trainer, it is important to understand and predict stages of training group dynamics and development so you can intervene and manage those dynamics in a way that will support learning.

      ❍ The skilled trainer notices patterns of interpersonal dynamics in the training room. Knowing when to respond to which dynamics and when to allow learners to handle the dynamics themselves is a skill that trainers learn through experience.

2. Show slide: Group Dynamics as a Continuum.

   ● Give a brief overview of the stages of group development.

      ❍ When learners and trainers come together as a training group,

5 minutes

5 minutes

form relationships with each other, and gain mastery of new ideas and skills, they undergo certain stages of group development. These different phases of group dynamics form a continuum which can be divided into five stages.

● Show slide: Stages of Group Development and discuss the phases of group dynamics.

❍ Stage 1: apprehension — the group is both nervous and excited about the training course and their roles.

❍ Stage 2: cohesion — the group becomes more familiar and comfortable with each other and begins to form interpersonal relationships.

❍ Stage 3: creation — the group begins to function as a team, applying new knowledge and skills with each other.

❍ Stage 4: achievement — learners have completed practice sessions and recognize their new skills.

❍ Stage 5: closure — learners may experience both a sense of accomplishment and loss about the course ending; they make follow-up plans and prepare for closure.

❍ During each stage, learners have different needs. Trainers should adjust their roles to help meet learners' needs at each stage.

❍ During the next few minutes, we are going to brainstorm about what trainers can do to enhance learning throughout the different stages of group learning.

3. Discuss learners' characteristics and trainer strategies during each of the five stages of group development.

● Distribute worksheet: Managing Stages of Training Group Dynamics.

● Show slide: Group Dynamics – Stage 1 and present learners' characteristics during stage one, apprehension.

❍ During stage one, learners:

• Are eager to begin the training course.

• Have high expectations of themselves and the trainers.

• Have some anxiety about why they are participating in the course, how they were chosen, what they will gain from the course and what will be expected of them after the course

• Are unsure about other members of the group.

• Are dependent on the trainers.

• May have questions about the training course.
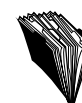
● Ask the group to brainstorm concrete strategies the trainer can use to manage stage one group dynamics.

   ❍ Ask how the trainer can help the group feel more comfortable and can facilitate learning.

   ❍ Suggest that they write down notes on the worksheet.

● After learners have finished brainstorming, show slide: Stage 1 — Trainer Strategies and highlight any trainer strategies learners did not mention.

   ❍ During stage one, trainers:

      • Evaluate learners needs and expectations.

      • Provide context, objectives and tone of the course.

      • Explain what the group will do and how they will do it.

      • Closely supervise activities.

● Repeat this process for stage two, cohesion.

● Show slide: Group Dynamics — Stage 2 and discuss learners' roles during stage two, cohesion.

   ❍ During stage two, learners:

      • Become more familiar and comfortable with each other.

      • Become more satisfied as the course design identifies the ways in which the learners will master skills, and the activities clarify how the group will work together.

      • Begin to experience the results of interactive techniques and realign their expectations to fit the reality of the course.

      • Through small-group activities, develop respect for other learners and group cohesion begins.

      • Begin to feel more self-esteem in relation to the group by mastering new skills.

      • Take pleasure in their accomplishments as more activities are completed successfully.

● Ask the group to brainstorm concrete strategies the trainer can use to manage stage two group dynamics.

   ❍ Ask how the trainer can help the group develop cohesion and facilitate learning.

   ❍ Remind learners to write down notes on the handout.

● After learners have finished brainstorming, show slide: Stage 2 — Trainer Strategies and highlight any trainer strategies learners did not mention.

   ❍ During stage two, trainers:

- Assume more coaching behaviors and are less directive in communicating with the group.

- Make observations that acknowledge the group progress in assuming responsibility for its own learning.

- Know when to intervene in the group and when to transfer responsibility to the learners as they gain more autonomy and confidence.

- Are able to let go of total control of the group.

● Show slide: Group Dynamics – Stage 3 and repeat this process for stage three, creation.

❍ During stage three, learners:

- Concentrate on integrating the concepts that they have learned throughout the course by applying them in group work and in skill practice sessions.

- Regard their fellow team members positively.

- Support other team members by recognizing their strengths and competence.

- Are able to challenge one another without fear of damaging their relationships.

- Communicate with candor and directness.

- As a group, recognize one another's contributions to the success of the course.

● After learners have finished brainstorming concrete strategies the trainer can use to manage stage three group dynamics, show slide: Stage 3 — Trainer Strategies.

❍ During stage three, trainers:

- Are aware that the special status of the trainer has been eliminated as the group has mastered the content and process of training.

- Treat group members as colleagues, yet are aware that they continue to need support in their newly discovered autonomy.

● Show slide: Group Dynamics – Stage 4 and repeat this process for stage four, achievement.

❍ During stage four, learners:

- Have strong positive feelings about their accomplishments.

- Have new reactions to clear, direct feedback about their performance.

● After learners have finished brainstorming concrete strategies the trainer can use to manage stage four group dynamics, show slide: Stage 4 — Trainer Strategies.

  ❍ During stage four, trainers:

    • Acknowledge accomplishments and skills learners have gained.

    • Review and discuss items that were set aside (for example in the Parking Lot), leaving no unfinished business.

● Show slide: Group Dynamics – Stage 5. Repeat this process for stage five, closure.

  ❍ During stage five, learners:

    • May experience both a sense of accomplishment and loss about the course ending.

    • Some learners may deny their sense of loss by joking, leaving the course early or dismissing other learners' statements about their feelings.

    • Make follow-up plans to use their new skills.

● After learners have finished brainstorming concrete strategies the trainer can use to manage stage five group dynamics, show slide: Stage 5 — Trainer Strategies.

  ❍ During stage five, trainers:

    • Design a special activity to create a sense of closure for the training course.

    • Are aware of their own feelings about the end of the training course and share them with learners, as appropriate.

    • Contribute to follow-up plans when needed.

4. Discuss the importance of being able to manage a wide range of challenges, including stages of group dynamics, in a training course.

● Explain to learners:

  ❍ In addition to group dynamics, there are many other challenges a trainer must face in a training course, including surprises, unfortunate events, challenging learners and the trainer's own mistakes. Having the capability to deal with these situations openly lets the trainer demonstrate exemplary trainer behavior to learners.

  ❍ When faced with a decision about how to manage a challenging situation during a training course, select the course of action that benefits the group as a whole.

5. Thank the group for their participation and summarize the session by stating that recognizing group development stages and employing strategies tailored for each stage will help create a supportive learning environment.

6. Link to next session

In subsequent sessions, we will explore some of these challenges in greater detail. During the next session, we will share strategies for coping with challenging learners during a training course.

Managing Stages of Training Group Dynamics

In stage I, apprehension, the learners: • Are nervous, but eager to begin the training course • Have high expectations of themselves and the trainers • Have some anxiety about why they are here, how they were chosen, what they will gain from the course, and what will be expected of them after the course • Are unsure about other members of the group • Are dependent on the trainers	**In stage I, apprehension, the trainers:**
In stage II, cohesion, the learners: • Become more familiar and comfortable with each other • Begin to form interpersonal relationships with each other • Relax as their roles become established and clear • Begin to acquire new skills • Get to know and respect each other and the trainers • Begin to coalesce as a group	**In stage II, cohesion, the trainers:**

Managing Stages of Training Group Dynamics

In stage III, creation, the learners: • Concentrate on integrating the concepts that they have learned throughout the course by applying them to the skills practice sessions • Regard their fellow team members positively • Support other team members by recognizing their strengths and competence • Are able to challenge one another without fear of damaging their relationships • Communicate with candor and directness • As a group, recognize one another's contributions to the success of the course	In stage III, creation, the trainers:
In stage IV, achievement, the learners: • Have strong positive feelings about their accomplishments • Have new reactions to clear, direct feedback about their performance	In stage IV, achievement, the trainers:
In stage V, closure, the learners: • Often feel a sense of loss or sadness about the ending of the course and their separation from other group members • Sometimes deny feelings by joking, leaving the course early, or dismissing other learners' statements about their feelings	In stage V, closure, the trainers:

Purpose:

The purpose of this session is to help trainers develop strategies for managing disruptive or challenging behaviors that learners might display during a training course. During this session, learners will identify types of learner behaviors that are particularly challenging to them and work in pairs to share strategies and practice managing this behavior.

Objectives:

At the end of this session, learners will be able to:

1. Identify types of challenging learner behaviors that are particularly difficult for them as trainers

2. Articulate strategies for successfully managing the behaviors of challenging participants

3. Demonstrate several ways of addressing challenging learners' behaviors

Materials:

❑ Challenging Learner Behavior cards

❑ Bell, chime or whistle

Advance Preparation:

❑ Copy and prepare a set of Challenging Learner Behavior cards for each participant

Total Time: 40 minutes

Instructions:

1. Introduce the topic: Managing Challenging Learner Behaviors.

   ● Explain to learners that:

      ❍ In most training groups there are learners whose behaviors pose some challenges to a smooth and effective training process. Most trainers have encountered learners whose behaviors have challenged them, been disruptive or slowed down the group process.

      ❍ Trainers have a responsibility to effectively address the needs of challenging learners to ensure that those individuals have an optimal learning experience and so they do not negatively affect group dynamics or impede the rest of the group's learning.

      ❍ During this session, we are going to identify and share strategies for working effectively with learners whose behavior can be challenging or disruptive.

2. Discuss different types of challenging learners.

5 minutes

30 minutes

● Facilitate the Challenging Learner Behavior activity.

❍ The next activity will allow learners to consider different types of challenging learner behaviors, identify which ones are most difficult for them to manage as trainers, share how they or other trainers have successfully dealt with these learners, and practice addressing the challenging learner.

● Give a brief explanation of the activity before asking learners to move.

● Ask learners to form two concentric circles with half the group in an inner circle facing out and half the group in an outer circle facing in so that each learner is paired up with the learner facing them.

● When learners are in the two concentric circles, distribute a set of Challenging Learner Behavior cards to each person. Ask learners to look at the front of their cards and determine the type of challenging learner who is most difficult for them to manage as a trainer. Ask learners not to read the back of the cards where the solutions are written.

● Ask the learner in the inner circle to share the challenging behavior they selected with their partner in the outer circle.

● Give the pair about two minutes for the learner in the outer circle to share the ways that they or other trainers have successfully managed this type of challenging learner behavior or how they might want to deal with such behaviors in the future. Remind learners not to look at the back of the cards. Use a bell, chime or whistle to acknowledge when the two minutes are over.

● Allot about one minute for the learner in the inner circle to read the solutions on the back of the card and discuss with their partner how their solutions were similar or different. Use the bell, chime or whistle to signify the end of the minute.

● Allot three minutes for the pair to role play and discuss actually addressing the challenging learner's behavior, with the person on the inner circle playing the role of trainer and the person on the outer circle playing the role of challenging participant. Explain that the role play gives them the opportunity to practice forming the words and strategies to address the challenging learner's behaviors. After two minutes, use the bell, chime or whistle and remind learners to take one minute to discuss their role play. Use it again to signal the end of the minute.

● Ask learners in the inner circle to stay where they are and ask the learners in the outer circle to take one step to their left so that everyone has a new partner.

● Have the learners repeat this exercise, this time having the learner in the outer circle select a behavior type that is most difficult for them to manage. Ask learners to select a different challenging learner behavior each time they change partners.

● After 20 minutes, ask learners to return to their seats.

● Ask a few learners to identify the challenging behavior they selected, offer the solutions their pair discussed for working effectively with them and briefly share how well they were able to manage the challenging learner during the role play.

● Remind learners that a chart on Working with Challenging Learners is on pages 30-32 of their reference manual.

3. Summarize the session.

● Offer general guidelines for coping with challenging learners:

❍ Some learners will test the trainer to see how the trainer handles an uncomfortable situation. Avoid a struggle of wills with a learner, as that is a situation that will not benefit the trainer, the learner or the group.

❍ Adults do not like to feel incompetent in front of their peers. Some-times learners try to make themselves feel superior by challenging the trainer. Trainers should not take this behavior personally, but respond in a way that does not meet the challenge directly.

❍ A skilled trainer never allows behaviors that are disruptive to other learners or the training process to continue.

❍ Especially during later stages of the training group development process, the trainer may allow learners to manage other learners' difficult behaviors, as long as the course they choose is not disrespectful or harmful.

❍ An effective trainer will identify the challenging learner's hidden skills or strengths and use them to manage the disruptive behaviors and benefit the group. For example, a "Know-it-all" may have extensive experience in the training topic. A trainer can make optimal use of this experience by asking the learner to make a presentation or lead a discussion on the topic. Giving the learner the opportunity to showcase their experience may also diffuse the learner's disruptive behavior.

❍ When deciding on a particular solution, the best course of action is always the one that benefits the most people in the group and harms no one.

4. Link to the next session.

Now that we have identified and practiced managing different types of challenging learners, we will move on to managing sensitive topics in groups.

"Know-it-alls"

May actually have a lot of information about the topic, but still could benefit from the experiences and perspectives of others.

"I'm only here because I have to be"

May have been required to attend the workshop, yet have no particular interest in the topic.

"Naysayers"

May be prejudiced.

Won't accept yours or other learners' points of view.

Unwilling to negotiate or compromise their position.

Often disruptive and create discomfort for the group.

"Talkers"

May be "eager beavers" or show-offs.

May be exceptionally well informed and anxious to show it, or just naturally wordy.

May need to be heard because they are still working through difficult emotional issues.

May take time away from other learners.

Challenging Learners Cards

Acknowledge that you know that some of the learners are present because they have to be.

Ask for their assistance in making this a meaningful experience.

Ask specifically, "How can I make this workshop helpful to you?"

Acknowledge that they are a wealth of information.

Approach them during a break and ask for their assistance in answering a specific question. At the same time, express that you want to encourage everyone to participate and enlist their help in doing so.

Do not be belittling or sarcastic – you may need their help later.

Slow them down with some difficult question or task, such as group leader.

Interrupt tactfully with something like, "That's an interesting point…now let's see what the rest of the group thinks of it."

In general, let the group take care of them as much as possible.

Avoid eye contact.

Give them a role.

State that one of your roles is to keep people on time.

Quick interruption – move nearby and put your hand on his or her shoulder.

Paraphrase what they say and move on.

Acknowledge that their stories are important, and you and others would love to hear them later or after the workshop.

Do not put them down or make them feel isolated. Keep them involved, if possible.

Throw their views to the group by questions or examples. Try to get the group to bring them around.

Say that time is short and you would be glad to discuss their issues with them individually.

Ask them to accept the views of the group or the trainer for the moment.

"Inaccurate commentators"

Come up with comments that are obviously incorrect.

"Clashers"

Two or more learners strongly disagree or bring personalities into the discussion. This can divide your group into factions.

"Side conversationalists"

Have conversations with their neighbors that may or may not be related to the topic, but are distracting to other learners or to you.

"Questioners"

May be genuinely curious.

May be testing you by putting you on the spot.

May have an opinion, but lack the confidence to express it.

Challenging Learners Cards

Emphasize points of agreement, minimize points of disagreement.

Point out how the argument has been productive in illustrating certain points.

Draw attention to objectives and ground rules of the session, cut across the argument with a direct question about the topic.

Bring a less argumentative learner into the discussion.

Keep your cool. Ask that personalities be omitted or that arguments be productive and directed toward topic definition or resolution.

Acknowledge emotionality of topic.

Stay neutral.

Stick to the topic.

Say, "Thank you for giving me a chance to clear up that point."

Say, "I see your point, but can we look at it this way…"

Don't ever put them down or make them feel stupid. Must be handled positively and delicately.

Ask if others have the same belief.

Acknowledge what they have offered as a common myth or commonly misunderstood concept.

Acknowledge that they seem to have a lot of questions about a particular topic.

If the questions seem like legitimate attempts to gain content information that other members of the group already know, tell them that you will be happy to work with them later to fill in the gaps, or put the question on the parking lot.

Reframe or refocus by sending the questions back to the questioner

Establish a buddy system (for example, ask for volunteers who would be willing to meet with them).

Do not embarrass them.

Call them by name; ask an easy question.

Call them by name, then restate the last opinion expressed or last remark made by group, and ask their opinion of it.

If you are in the habit of moving around the room, saunter over and stand casually behind them. This should make their conversation obvious to them and the group.

Ask the group to add "no side conversations" to the list of ground rules.

Challenging Learners Cards

"Ramblers"

Talk about everything but the topic.

Use inappropriate or farfetched examples from their own experiences.

"Shy and Timids"

May feel timid or insecure.

May be bored or indifferent.

"Off-based commentators"

Are not rambling, but make comments that are not relevant to discussion.

May confuse other learners.

"Arguers"

Have combative personalities.

May not want to be at the workshop.

May be upset by personal or family health issues.

May upset other learners.

Challenging Learners Cards

Try to arouse their interest by asking them an easy, direct question. Talk to them on a personal basis with the group looking on.

Ask questions of the person next to them, and then ask them to respond to that person's answer.

When they stop for a breath, thank them, refocus attention by restating relevant points and move on.

Smile, tell them that their points are interesting, apply them to the discussion, if you can, and indicate in a friendly manner that the group is getting a bit off the subject.

Keep your own temper firmly in check. Do not let the group get excited either.

Honestly try to find merit in one of their points, or get the group to do it, and then move on to something else. Say, "That was a good point" or "We've heard a lot from [person's name]; who else has some ideas?"

If facts are misstated, ask the group for their thoughts; let them make the corrections.

As a last resort, talk with them in private, find out what's going on and ask for their cooperation. Say, "Let's talk during the break. How can we be on the same team?"

Give them a role.

Say, "How would you relate this to the discussion at hand?"

Say, "It sounds like what you are saying is…" and then rephrase. Then clarify, "Is that a fair statement of your point?"

Set aside the comment or question for later discussion.

Reframe or refocus onto the topic.

Explain where the learners' comments fit into curriculum.

Challenging Learners Cards

"Gripers"

Have a pet peeve with you, the group, the subject, the health-care system, etc.

"Emotionals"

Become very emotional during training.

May be needing lots of support.

May upset other learners.

Challenging Learners Cards

Offer support by saying,
"It seems like you're feeling
very upset right now."

Make sure they feel free to leave
the room if they find it is necessary
to take care of themselves.

Allow other learners to comfort them.

Encourage them to talk with you or
others during breaks or at the
end of the workshop.

Indicate that you'll discuss the
problem with them later in private.

Throw the issue back to the
group. Have a member of
the group answer them.

Indicate time pressures and
emphasize the need to move on.

(Adapted from CSAP, 1994)

Managing Sensitive Topics in Groups

Purpose:

In this session, learners identify sensitive topics that may arise during a reproductive-health training course, strategize ways to productively manage sensitive topics in groups and practice using these strategies. Learners will also examine how their personal beliefs may affect a training course and share strategies for managing these beliefs.

Objectives:

At the end of this session, learners will be able to:

1. Identify potentially sensitive topics and explain how they can disrupt effective group process

2. Articulate strategies for managing their own opinions on sensitive topics that may arise while they are facilitating training courses

3. Explain several strategies to manage sensitive topics in groups

4. Demonstrate one strategy to manage differing opinions on a sensitive topic

Materials:

❑ Flipchart

❑ Markers

❑ Reference manual

❑ Tape

❑ Notecards or sticky notes in two different colors (each participant receives two cards, one of each color)

❑ Basket

❑ "Agree" and "disagree" cards

Advance Preparation:

❑ Label flipchart: Sensitive Topics

❑ Label flipchart: Ways to Effectively Manage Sensitive Topics

❑ Prepare two flipcharts, each with a relevant and potentially sensitive sentence fragment

❑ Prepare flipchart with sensitive topic statement

❑ Copy and Prepare "agree" and "disagree" cards

Total Time: 1 hour 10 minutes

1. Introduce the session: Managing Sensitive Topics in Groups.

● Explain to learners that:

❍ In any training course, a topic can arise which may create conflict or discomfort for both trainers and learners.

❍ Discussions can create tension when participants voice strong and opposing opinions.

❍ The social, cultural and political context of the training course and the composition of learners have a large impact on which topics are sensitive. Different topics are sensitive in different contexts.

❍ Trainers may be able to anticipate which topics could be sensitive because of the material being covered or the audience participating in the training course, but topics that create discomfort among participants can arise unexpectedly.

❍ Learners may not always voice their discomfort. They may show their discomfort in other ways, for example through body language.

❍ Trainers may choose to deliberately introduce a sensitive topic for a variety of reasons, including: challenging learners to question their beliefs, helping learners gain an appreciation for other viewpoints and giving learners the opportunity to practice managing conflict.

❍ The manner in which a trainer manages the sensitive topic can determine whether the experience becomes a constructive learning opportunity or disrupts the learning process.

● Post flipchart: Sensitive Topics and ask group to identify some topics that could cause unease in a reproductive-health training course. Write their comments on the flipchart. Topics may include, but are in no way limited to the following:

❍ Religion.

❍ Health laws and policies.

❍ HIV+ women who want to have children.

❍ Abortion.

❍ Female genital cutting.

❍ Sexual relationships and behaviors between people of the same sex.

❍ Transgender issues.

❍ Abstinence-based HIV/STI prevention programs.

❍ Commercial sex work.

❍ Adolescents having sex.

2. Discuss ways to effectively manage sensitive topics in groups.

● Post flipchart: Ways to Effectively Manage Sensitive Topics and ask learners to brainstorm strategies for effectively handling sensitive topics in groups. Write comments on flipchart and add from the following list if learners do not mention these solutions:

❍ Recognize the topic as valid.

❍ Acknowledge that it may feel sensitive to some learners.

❍ Examine potential for discovering common ground.

❍ Encourage participation from all learners.

❍ Represent conflict as an opportunity to deepen everyone's understanding of the topic and create a meaningful learning experience.

● Give learners five minutes to review pages 27-29 in their reference manual for examples of how to manage sensitive topics.

3. Facilitate activity on the diversity of opinions on sensitive topics.

We have discussed some sensitive topics that may arise during a training course, as well as some strategies for managing them. Now we are going to do a structured activity that will demonstrate how to turn opposing opinions on sensitive topics into a learning situation.

● Give each learner two note cards or sticky notes of different colors.

● Provide the following instructions:

❍ The trainer will show two sentence fragments, one at a time. After learners read each statement, they will write down their immediate response to it. They can write their initial feeling, opinion or reaction. Encourage them not to think through their reaction too much or censor themselves.

❍ All of the responses to the first statement should be on one color card and responses to the second statement on a second color card.

❍ Because responses should be anonymous, learners should not include their names. The group will see and discuss the responses without knowing who wrote each one.

Note to trainers: You may want to select different sentence fragments than those suggested here. If so, in advance you can determine two sentence fragments that are relevant and potentially sensitive for your training audience and write them on two different flipcharts.

10 minutes

20 minutes

● Post the flipchart with the first sentence fragment, for example:

❍ **Women living with HIV who want to have children…**

● Give participants 30 seconds to write down a response. Remind them to write down their immediate reaction to the fragment and avoid censoring themselves.

● Collect responses and stick them on first flipchart.

● Post the flipchart with second sentence fragment, for example:

❍ **Parents who make their daughters undergo female genital cutting…**

● Give participants 30 seconds to write down a response. Again, remind them to write down their immediate reaction to the fragment.

● Collect responses and stick them on second flipchart.

● After all responses have been posted, ask a volunteer to read responses from the first flipchart. Ask a different volunteer to read reactions from the second flipchart.

● Facilitate a group discussion about the activity using the following observations and questions.

❍ *As we can see from these two examples, people have different opinions about sensitive topics that may arise during a reproductive-health training course.*

❍ *What are some of your observations about the diversity of opinions in the room?*

❍ *What impact could these different opinions have on us as trainers?*

❍ *What divergent opinions about sensitive topics have arisen during a training course you led?*

❍ *How have you managed these sensitive topics with the group?*

❍ *As a facilitator, how might your opinions influence the learning environment during a training course?*

❍ *As a trainer, what do you do when you have strong opinions about a topic that arises during a training course?*

● Ensure that learner responses to the discussion questions adequately address the need for trainers to be mindful of their own viewpoints and avoid being drawn into heated arguments or conflicts themselves.

Trainers need to separate their own opinions from the discussion at hand to be able to skillfully manage conflict and maintain a positive learning environment for learners.

4. **Facilitate an activity during which participants practice managing sensitive topics.**

- Explain that during the next part of this session, learners are going to practice different ways of managing sensitive topics when they arise during a training course.

  ❍ When opposing viewpoints on a sensitive topic arise during a course, trainers need to assess whether they should capitalize on a learning opportunity or tactfully transition to a new topic.

  ❍ Trainers may decide to take advantage of the opportunity by facilitating a structured activity that helps participants learn more about different perspectives or build common ground with learners who have different opinions.

  ❍ In some cases, especially when the conflict is so heated that participants are becoming upset and the learning environment is disrupted, the best course of action may be to transition to a new topic.

- Introduce the activity.

  ❍ Explain that in the next activity, learners will use one of the same topics from the sentence fragments activity.

  ❍ Explain that learners are going to practice an activity that they could use as trainers in the future when a sensitive topic arises.

- Place an equal number of "agree" and "disagree" cards in the basket, enough for one card per person.

- Ask participants to draw a card from the basket without looking at the cards.

- Explain that this card will determine their viewpoint about the statement for the next few minutes. Those participants with "agree" cards will agree with the statement and those with the "disagree" cards will disagree with the statement. Ask learners to fully defend their viewpoint for this activity, whether the viewpoint matches their own beliefs or not. Caution participants not to begin their answers with, *"I don't feel this way, but..."*

- Post flipchart with a sensitive topic statement that addresses one of the same topics used in the previous activity, for example:

  ❍ **Women living with HIV have the right to have children.**
  OR

❍ Because female genital cutting is rooted in cultural values, people should not interfere with the practice.

● Instruct the participants with "agree" cards to gather on one side of the room and participants with "disagree" cards to gather on the other side.

● Ask each group to take five minutes to explore the following questions and appoint one person to report on the group's responses.

❍ Ask the agree group to answer the questions:

- *What are some reasons someone might agree with this statement?*

- *How might this opinion cause conflict with someone who disagreed with this statement?*

- *As a trainer, what could you do to create a learning opportunity when different opinions arise on this topic?*

❍ Ask the disagree group to answer the questions:

- *What are some reasons someone might disagree with this statement?*

- *How might this opinion cause conflict with someone who agreed with this statement?*

- *As a trainer, what could you do to transition to a new topic when heated and opposing opinions arise on this topic?*

● Give groups a one-minute warning to make sure they finish answering all of the questions.

● Gather participants back into larger group. First ask the reporter for the agree group to share the group's responses to the three questions and then have the reporter from the disagree group share their responses. Remind reporters to speak as though the viewpoints were really their own.

● Explore the activity by discussing the following questions:

❍ *What did you learn from this activity?*

❍ *What is the value in understanding someone else's viewpoint?*

❍ *How did you feel about the strategies each group suggested for handling this sensitive topic?*

❍ *How might you use this activity when sensitive topics arise in your future training courses?*

● Acknowledge that while there may not be group consensus on the topic, by using appropriate strategies, it is possible to deepen learners' understanding of other people's viewpoints.

5. Summarize session on managing sensitive topics.

● In closing, explain to learners that:

❍ This session covered a few ways to manage difficult or sensitive subjects that may arise in a training course.

❍ If the topic offers potential for a constructive learning opportunity, the trainer may choose to guide participants in a structured activity where they are able to process their feelings, understand different viewpoints more fully and come to some kind of resolution about group differences. An example of that is the activity we just completed.

❍ If the trainer determines a learning opportunity is unlikely, then he or she may transition to a less sensitive subject, taking care not to ignore or trivialize the topic. The disagree group gave us some strategies on how to do that.

❍ Trainers should exercise strong group-facilitation skills to include all opinions, regardless of learners' differing communication styles. This inclusion will ultimately keep discussions constructive and create natural, unforced resolution, while still acknowledging individual differences that remain.

6. Link to next session.

Now that we have covered how to manage training group dynamics, challenging learners and sensitive topics, we can apply some of these skills as we practice facilitating different training methods.

Agree/Disagree Cards

Agree	Disagree
Agree	Disagree
Agree	Disagree
Agree	Disagree
Agree	Disagree
Agree	Disagree
Agree	Disagree

Purpose:

The purpose of this session is to introduce different training methods that facilitate participants' learning and practice of new knowledge, attitudes and skills. Learners will practice using different kinds of training methods and receive structured feedback about their performance as trainers.

Objectives:

At the end of this session, learners will be able to:

1. Describe various training methods, their advantages and disadvantages

2. Describe which training methods are most appropriate to achieve different learning objectives

3. Identify which training methods are most effective with different types of learners

4. Practice planning and facilitating different training methods

5. Give and receive constructive feedback

Materials:

❑ Training Methods cards

❑ Items for dividing participants into groups

❑ Reference manual

❑ Optional: Prizes for winning group members

❑ Flipcharts

❑ Markers

❑ Sample teach-back topics

❑ Training Methods Teach-Back Assessment Forms

❑ Chime, bell or whistle

❑ Handout: Giving and Receiving Feedback

Advance Preparation:

❑ Create two sets of training methods cards: one set of same color cards has a different training method pasted onto each one; second set of cards in a different color has the description pasted on each one (methods and descriptions can be copied, cut and pasted from reference manual pages 60-61). The number of sets depends on the number of small groups.

❑ Prepare flipchart: Instructions: Preparing, Demonstrating and Discussing the Teach-backs (main steps of instructions only).

❑ Copy Training Methods Teach-Back Assessment Forms.

❑ Copy handout: Giving and Receiving Feedback.

❑ Create a 10-minute teach-back activity for demonstration.

Note to trainers: Note to trainers: During this session you will be modeling how to conduct a teach-back activity, facilitate a brainstorming session, and solicit and receive feedback. You will need to have a 10-minute teach-back activity ready before beginning this module. We recommend designing a 10-minute activity using the "game" training method because this training method is one that you would not plan to have learners demonstrate for their teach-back activity.

🕐 Total Time: 2 hours 30 minutes

Note to trainers: You will need approximately 15 minutes per group. The total time depends on the number of small groups in the teach-back activity.

Instructions:

1. Introduce the session: Training Methods.

   ● Explain the purpose of learning different training methods.

   The purpose of this session is to introduce the different training methods that facilitate learning and practice of new knowledge, attitudes and skills. You will practice using different kinds of training methods and receive structured feedback about your performance as trainers.

2. Review training methods through a game in small groups.

   ● Use a creative way of dividing learners into small groups.

   ● Give each group a set of training methods cards that you have prepared in advance and shuffled to change the order.

   ● Instruct each group that when you say "start," they will correctly match the training method to the description. When you review groups' matched cards, use the reference manual pages 60-61 as your answer key.

   ● Optional: The first group to correctly match all 15 training methods wins a prize.

3. Introduce teach-backs and give instructions for the training methods teach-back activity.

   ● Inform participants that they will now participate in a teach-back activity to help them practice designing and facilitating different training methods. Define teach-back activity.

      ❍ A teach-back is a type of demonstration where learners take a particular topic, technique or skill they have learned during the

training course and demonstrate or teach it back to the other participants and trainers.

❍ Afterwards, the other learners and trainers provide feedback on how well the participants demonstrated that skill.

❍ Teach-backs are an excellent way to have learners practice applying new information or skills, receive constructive feedback to further hone their skills, and demonstrate competence in a supportive setting such as a training course.

❍ One disadvantage to a teach-back activity is that it can take a significant amount of time.

❍ During this teach-back activity, learners will practice designing and facilitating some of the more common training methods.

● Post flipchart: Instructions: Preparing, Demonstrating and Discussing the Teach-backs.

❍ Small groups will take 20 minutes to design and practice their activity.

❍ Ensure that your activity takes no more than five minutes to demonstrate and 10 minutes to debrief.

❍ Select a topic area or skill that is both familiar to your group members and is appropriate for your assigned training method.

❍ Use three resource materials to help you design an activity that demonstrates the effective use of one particular training method.

   • Overview of training methods in reference manual pages 60-61.

   • Training Methods: Recommendations for Effective Use in reference manual Appendix 6, pages 102-122.

   • The Training Methods Teach-Back Assessment Form for your method outlines what a successful implementation of your training method should include.

❍ One at a time, small groups will demonstrate their activity.

   • One group member will pass out the teach-back assessment form for their training method.

   • The group will choose the type of applause they would like.

   • Group members will lead the rest of the learners through the activity.

   • At the end of the activity, the rest of the learners will applaud according to the chosen type of applause.

❍ After the activity demonstration, a group member will lead a brief brainstorming session with the large group, identifying:

- Advantages and disadvantages of that training method.
- Which learning objectives can be met with this training method.
- Learning styles that are the best match with that training method.

❍ Solicit feedback about the small group's demonstration.

- A small-group member will solicit feedback about the activity demonstration, asking what went well and what could use improvement.
- The learners should use their assessment forms as a guide for providing feedback.
- A small-group member will then thank the group and collect the assessment forms.

❍ Recommendations for splitting up small-group work:

- All small-group members should play a role in the activity design.
- Group members can divide up responsibilities for demonstrating activity, leading brainstorm, soliciting and receiving feedback, and recording responses on a flipchart.

● Tell learners that you will first model the teach-back activity and answer any questions they have.

● Discuss ground rules for giving and receiving feedback.

To add a little fun, let's acknowledge each small group's activity with tailored applause. Before each group begins, they will tell the rest of the learners what kind of applause they would like to receive (for example, a special clap, stamping feet, waving, a particular sound, or a whistle).

❍ Distribute handout: Giving and Receiving Feedback and review ground rules for feedback.

4. Model a teach-back.

20 minutes

● Conduct a pre-prepared demonstration teach-back to model the proper way to carry out this teach-back activity.

❍ Teach an activity.

❍ Lead a brainstorming session to discuss advantages, disadvantages, objectives met and best match for which learning style.

❍ Solicit feedback from participants, modeling the ground rules for giving and receiving feedback.

● Ask the learners what questions they have from the example.

5. Small groups plan teach-back activities.

25 minutes

> **Note to trainers:** Time for this activity was based on 15 minutes per group for four groups. You may need more or less time depending on the number of small groups you have.

● Creatively divide participants into small groups of no fewer than three and no more than six members.

● Assign each small group a training method and distribute the appropriate Training Methods Teach-Back Assessment Form.

❍ Training methods included in this activity are: Presentation/Lecture/ Panel Discussion, Small-Group Discussion, Brainstorming, Case Study, Demonstration and Return Demonstration, Role Plays and Games.

● Instruct each small group to begin designing their activity using their training method and following the instructions posted on the flipchart: Instructions: Preparing, Demonstrating and Discussing the Teach-backs. Circulate around the room offering guidance as needed.

● Sound the chime or other signal after 15 minutes and remind groups to start practicing their activity within their small group.

● When 20 minutes have passed, sound chime to bring the small groups back to the large group.

> **Note to trainers:** Select training methods that learners have less experience designing and using to give them the opportunity to expand their repertoire of training methods. You may want to poll learners in advance of the activity to determine with which methods they are more familiar.

6. Small groups conduct teach-backs.

1 hour 5 minutes

● Ask each small group to demonstrate their training method, following the instructions above.

● Trainers should act as timekeepers and prompt each group to stay within its allocated 15 minutes (five minutes for demonstration and 10 minutes for brainstorm and feedback).

● When all small groups have implemented their teach-back activities, ask the learners to get back together into their small groups for a five-minute reflection on how the activity went and what they learned from the feedback.

7. Evaluate and summarize activity.

15 minutes

● Hand out flipchart paper and markers to small groups. Have each group write the name of their training method on the top of a flipchart along with
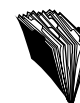
one thing they learned about this training method, one thing they really liked about their method and one thing they would do differently next time. Post these on the wall for learners to look at during the next break.

● In closing, discuss the usefulness of the teach-back as a training method (5 minutes).

❍ *What have you learned about teach-backs?*

❍ *What are some examples of sessions in training courses you currently facilitate where you could effectively use teach-backs?*

❍ *Under what training situations might it be best to avoid using teach-backs?*

● Thank the groups for their participation.

8. Link to next session.

Now that we have learned about and practiced different training methods, we will focus specifically on how to use icebreakers, energizers and breaks effectively in a training course.

Giving and Receiving Feedback

The process of giving and receiving feedback involves giving the person playing the role of trainer information about their performance, and as the person playing the trainer role, listening receptively to suggestions for improvement.

Giving feedback includes providing people with information about what they do well, in addition to identifying aspects of their performance that need improvement and offering realistic suggestions for helping them improve their performance.

Ground rules for GIVING feedback:

- Offer praise before sharing constructive criticism.

- Offer feedback using the first person — for example, "I think," "I saw," "I feel," "I noticed."

- Be brief in your comments.

- Direct comments towards behaviors over which the person has control and can change.

- Offer constructive criticism by offering ideas for improvement.

- Criticize the performance not the performer.

- Describe what you saw and heard, but avoid making judgments.

Constructive feedback: "You were very thorough and seemed to cover all of the important steps. When you asked the person playing the role of client if she had any questions, however, I noticed that you were still filling out her chart and were not looking at her. Perhaps if you stopped what you were doing and made eye contact with her, she would feel more comfortable asking questions."

Unconstructive feedback: "You ignored the client because you were too focused on filling out the chart. You asked, but you didn't even care if she had any questions. Your voice is too deep and intimidating."

Ground rules for RECEIVING feedback:

- Ask for specific and descriptive feedback.

- Ask clarifying questions to understand the feedback.

- Accept feedback. Do not defend or justify behavior.

- Listen to the feedback and thank learners or fellow trainers for sharing their perspectives.

- Reflect on the feedback and use relevant feedback as information to improve performance.

Note to trainers: Remember that you may not always agree with all the feedback you receive, but if two or three people provide similar feedback, they may be highlighting an aspect of your behavior or style that could be improved.

Sample Teach-Back Topics
Safe Abortion Care/Postabortion Care

Note: You will need to consider your learners' skills sets and backgrounds and pick your activities accordingly.

TOPIC	MATERIALS
Presentation/Lecture/Panel Discussion	
Uterine evacuation methods	Slides, other visual aids
Pain management	Slides, other visual aids
Patient care needs	Panel of people playing the role of patients
Small-Group Discussion	
Essential elements of a counseling session	Flipchart paper, markers, worksheets
Components of follow-up care	Flipchart paper, markers, worksheets
Brainstorming	
Community and service-provider partnerships	Flipchart paper, markers, index cards
Referrals for other reproductive-health services	Flipchart paper, markers, index cards
Case Study	
Assessment and treatment plan	Case study scenarios, discussion questions
Abortion complications	Case study scenarios, discussion questions
Demonstration	
Creating a vacuum with MVA	MVA syringe
Instrument processing	Instrument and locally appropriate instrument processing supplies
Role Play	
Abortion counseling	Instructions, checklist
Emotional monitoring and support	Instructions, checklist
Games	
Introduction to PAC (PAC Bingo)	Instructions, Bingo cards with a PAC question in each square, pens
Steps of a clinical assessment	Instructions, cards with assessment steps

Sample Teach-Back Topics
Other Sexual- and Reproductive-Health Topics

Note: You will need to consider your learners' skills sets and backgrounds and pick your activities accordingly.

TOPIC	MATERIALS
Presentation/Lecture/Panel Discussion	
Prevalence and incidence of HIV/AIDS in a particular country	Slides, other visual aids
Overview of lessons learned from STI prevention programs	Panel of people playing the role of program managers
Small-Group Discussion	
Advocating for sexuality education in schools	Flipchart paper, markers
Creating a plan for upgrading reproductive-health training in your organization	Flipchart paper, markers
Brainstorming	
Reducing teen pregnancy rates	Flipchart paper, markers
Community health education strategies	Flipchart paper, markers
Case Study	
Dealing effectively with challenging patients	Case study scenarios, discussion questions
Effective communication about STI prevention between sexual partners	Case study scenarios, discussion questions
Demonstration	
Giving a Depo-Provera shot	Depo-Provera, an orange
Inserting an IUD	IUD, pelvic model
Role Play	
Assessing patients' cervical cancer risk	Instructions, Patient Assessment form
Taking a patient's sexual history	Instructions, checklist
Games	
How to put on a condom (Blindfolded condom race)	Scarves, condoms, bananas or phalluses, chairs
Ovulation facts (Ovulation Bingo)	Bingo cards with an ovulation question in each square, pens

Training Methods Teach-Back Assessment Form
Presentation/Lecture/Panel Discussion

Your Name _____

For each item described below, please rate the group's implementation of the teach-back as Satisfactory (S) or Needs Improvement (NI) by placing a check (✓) in the appropriate column. In the Comments column, record *specific* comments that you think might help the group improve their performance or name what they did that was particularly effective.

Item	S	NI	Comments
Introduced activity: Trainer explained purpose of the presentation/lecture/panel discussion, why it was important, linked to training course objectives and gave an overview of main points.			
Relevance: Trainer related presentation/lecture/panel discussion to training course, learners, and/or situation, and built on learners' experiences.			
Involved learners: Trainer involved learners by making the presentation/lecture/panel discussion interactive and participatory (for example, asked open-ended questions, asked for learners' input, assistance and/or experience).			
Held learners' attention: Trainer offered unique facts, personal experiences and stories, posed questions, varied the pace, was enthusiastic or humorous, etc.			
Provided smooth transitions: Trainer provided smooth transitions between topics, explicitly indicating a shift in topic and linking topics together.			
Provided closure: Trainer summarized activity, emphasizing key points and relating topic to learners' experiences and/or rest of training course.			
Trainer as learner: Trainer was open to feedback and sought to fully understand learners' assessment of teach-back.			

Training Methods Teach-Back Assessment Form
Small-Group Discussion

Your Name _____

For each item described below, please rate the group's implementation of the teach-back as Satisfactory (S) or Needs Improvement (NI) by placing a check (✔) in the appropriate column. In the Comments column, record *specific* comments that you think might help the group improve their performance or name what they did that was particularly effective.

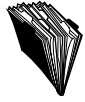| Item	S	NI	Comments
Introduced activity: Trainer introduced activity, linked to training course objectives, told learners time frame, and asked learners about clarity of instructions.			
Organized learners to complete task: Trainer used creative means to divide learners into small groups and clarified group members' roles.			
Was available to groups: Trainer circulated among groups, clarifying instructions, answering questions, and mediating any difficulties (such as dominating group members, poor time management, etc.).			
Led group discussion: Trainer reconvened group, elicited the small groups' findings, and led a large group discussion using open-ended questions.			
Supported learning: Trainers provided a supportive learning environment by encouraging active participation and providing positive reinforcement (such as praise, constructive feedback, valuing contributions, active listening) and by managing group dynamics.			
Synthesized: Trainer identified common themes, tied these to other aspects of learners' experience and/or training, and elicited how learners might use the findings.			
Provided closure: Trainer summarized activity, emphasizing key points and relating topic to learners' experience and/or rest of training course.			
Trainer as learner: Trainer was open to feedback and sought to fully understand learners' assessment of teach-back.			

Training Methods Teach-Back Assessment Form
Brainstorming

Your Name _____

For each item described below, please rate the group's implementation of the teach-back as Satisfactory (S) or Needs Improvement (NI) by placing a check (✔) in the appropriate column. In the Comments column, record *specific* comments that you think might help the group improve their performance or name what they did that was particularly effective.

Item	S	NI	Comments
Introduced activity: Trainer introduced task and time frame, described roles, linked to training course objectives, and asked learners about clarity of instructions.			
Established rules: Trainer described topic for brainstorm session and described method, emphasizing that all ideas are accepted, that no idea will be criticized, and that discussion will come after ideas have been listed.			
Recorded and reflected ideas: Trainer or co-trainer recorded ideas on flipchart, being careful to use learners' own words and reflecting ideas back when paraphrasing.			
Supported learning: Trainers provided a supportive learning environment by encouraging active participation and providing positive reinforcement (such as praise, constructive feedback, valuing contributions, active listening) and by managing group dynamics.			
Reviewed collected ideas: Trainer reviewed ideas and encouraged discussion and identification of common themes.			
Provided closure: Trainer summarized activity, emphasizing key points and relating findings to the training's topic and learners' experiences.			
Trainer as learner: Trainer was open to feedback and sought to fully understand learners' assessment of teach-back.			

Training Methods Teach-Back Assessment Form
Case study

Your Name _____

For each item described below, please rate the group's implementation of the teach-back as Satisfactory (S) or Needs Improvement (NI) by placing a check (✔) in the appropriate column. In the Comments column, record *specific* comments that you think might help the group improve their performance or name what they did that was particularly effective.

I t e m	S	N I	C o m m e n t s
Introduced activity: Trainer introduced activity (purpose, time frame, roles), linked to training course objectives, handed out or displayed case study, allowed learners to review case study and asked learners about clarity of instructions.			
Organized learners to complete task: If desired, trainer used creative means to divide learners into pairs or small groups to work on case study.			
Was available to groups: Trainer circulated among learners, clarifying instructions, answering questions, and mediating any difficulties (such as dominating group members).			
Led group discussion: Trainer reconvened group, had some or all of the small groups report back, and led a large group discussion using open-ended questions.			
Supported learning: Trainer provided a supportive learning environment by encouraging active participation and providing positive reinforcement (such as praise, constructive feedback, valuing contributions, active listening) and by managing group dynamics.			
Synthesized: Trainer identified common themes, tied these to other aspects of learners' experience and/or training, and elicited how learners might use the findings.			
Provided closure: Trainer summarized activity, emphasizing key points, and relating topic to learners' experience and/or rest of training.			
Trainer as learner: Trainer was open to feedback and sought to fully understand learners' assessment of teach-back.			

Training Methods Teach-Back Assessment Form
Demonstration and Return Demonstration

Your Name _____

For each item described below, please rate the group's implementation of the teach-back as Satisfactory (S) or Needs Improvement (NI) by placing a check (✔) in the appropriate column. In the Comments column, record *specific* comments that you think might help the group improve their performance or name what they did that was particularly effective.

Item	S	NI	Comments
Introduced activity: Trainer introduced skill being demonstrated and instructions for task (purpose, time frame, roles, materials), linked activity to course objectives and asked learners about clarity of instructions.			
Demonstrated skill: Trainer demonstrated skill and then repeated demonstration, explaining each step in detail.			
Answered questions: Trainer invited learners to ask questions and adequately addressed any questions or concerns.			
Allowed learners to practice: Trainer provided time, materials and adequate space for learners to practice skill.			
Was available to groups: Trainer circulated among learners, clarifying instructions, answering questions and mediating any difficulties.			
Led group discussion: Trainer reconvened group, answered questions and led a large group discussion using open-ended questions concerning demonstration.			
Supported learning: Trainers provided a supportive learning environment by encouraging active participation and providing positive reinforcement (such as praise, constructive feedback, valuing contributions, active listening) and by managing group dynamics.			
Provided closure: Trainer summarized activity, emphasizing key points, and relating topic to learners' experience and/or rest of training.			
Trainer as learner: Trainer was open to feedback and sought to fully understand learners' assessment of teach-back.			

Training Methods Teach-Back Assessment Form
Role Play

Your Name _____

For each item described below, please rate the group's implementation of the teach-back as Satisfactory (S) or Needs Improvement (NI) by placing a check (✔) in the appropriate column. In the Comments column, record *specific* comments that you think might help the group improve their performance or name what they did that was particularly effective.

I t e m	S	N I	C o m m e n t s
Introduced activity: Trainer introduced activity and instructions for task (purpose, time frame, roles, role play), linked activity to course objectives and asked learners about clarity of instructions.			
Organized learners to complete task: If desired, trainer used creative means to divide learners into small groups to work on role plays.			
Provided time to reflect or plan: Trainer offered adequate time for learners to plan their role plays.			
Facilitated role-play practice: Trainer facilitated learners' role-play practice, clarifying instructions, answering questions and mediating any difficulties.			
Led group discussion to process role plays: Trainer reconvened group, thanked role-play actors, and encouraged discussion about the role play(s) using open-ended questions emphasizing what was learned during the role-play.			
Supported learning: Trainers provided a supportive learning environment by encouraging active participation and providing positive reinforcement (such as praise, constructive feedback, valuing contributions, active listening) and by managing group dynamics.			
Provided closure: Trainer summarized activity, emphasizing key points and relating topic to learners' experience and/or rest of training course.			
Trainer as learner: Trainer was open to feedback and sought to fully understand learners' assessment of teach-back.			

Training Methods Teach-Back Assessment Form
Games

Your Name _____

For each item described below, please rate the group's implementation of the teach-back as Satisfactory (S) or Needs Improvement (NI) by placing a check (✔) in the appropriate column. In the Comments column, record *specific* comments that you think might help the group improve their performance or name what they did that was particularly effective.

Item	S	NI	Comments
Introduced activity: Trainer introduced activity and instructions for game (purpose, time frame, roles, how to play game), linked to training course objectives and asked learners about clarity of instructions.			
Provided time to ask questions: Trainer offered time for learners to review game materials and instructions and ask questions.			
Organized learners to complete task: If desired, trainer used creative means to divide learners into groups to play games.			
Facilitated game: Trainer facilitated learners playing the game, circulating among the game players.			
Processed game: Trainer brought group back together and asked how well the game went and how they might apply the results to their training courses.			
Supported learning: Trainer provided a supportive learning environment by encouraging active participation and providing positive reinforcement (such as praise, constructive feedback, valuing contributions, active listening) and by managing group dynamics.			
Provided closing: Trainer summarized activity, emphasizing key points and relating topic to learners' experience and/or rest of training.			
Trainer as learner: Trainer was open to feedback and sought to fully understand learners' assessment of teach-back.			

Use of Breaks, Icebreakers, Energizers and Closing Activities

Purpose:

This session emphasizes the importance of incorporating breaks, icebreakers, energizers and closing activities into training courses to create a comfortable and supportive learning environment, help learners to maintain energy and focus throughout a course, increase learner retention and recall, and provide closure at the end of the course.

Objectives:

At the end of this session, learners will be able to:

1. Explain the purpose of incorporating breaks, icebreakers, energizers and closing activities into training courses

2. Describe the ways breaks, icebreakers, energizers and closing activities can positively influence learners' training experience

3. Identify several factors to consider when determining an appropriate icebreaker, energizer and closing activity

Materials:

❏ Flipchart

❏ Markers

❏ Reference manual

Advance Preparation:

❏ Label flipchart: How Icebreakers Influenced You

❏ Label flipchart: How Energizers Influenced You

❏ Label flipchart: What to Consider When Choosing Icebreakers, Energizers and Closing Activities.

Total Time: 25 minutes

Note to trainers: Ideally, you would schedule this session at the end of the day.

Instructions:

1. Introduce the session: Use of Breaks, Icebreakers, Energizers and Closing Activities.

   ● Explain the purpose of the session to learners.

   In previous sessions, we discussed strategies for creating a productive learning environment. In this session we are going to spend some time discussing some other important strategies to increase learners' physical and emotional comfort during training events, as well as to facilitate their retention of training material.

As you have noticed, we are integrating icebreaker and energizer activities and other regular breaks into this training course. These activities and breaks do not just help keep the course interesting and learners motivated to learn, but they also help to build trust between participants and reveal talents participants have to offer.

2. Introduce the topic of breaks.

● Discuss the reasons why breaks are essential to learning.

❍ After 50 minutes, learners' abilities to retain and recall information significantly decline.

❍ Learners need regular breaks from concentrated learning to maintain their focus and increase their information recall.

❍ Trainers can enhance learning by integrating regular breaks into training courses in a number of ways:

• The use of energizer activities.

• The use of snack and meal breaks.

• Structuring long training sessions so that they include a number of different training methods as well as opportunities for physical movement.

● Explain importance of snack and meal breaks.

❍ Unlike icebreaker and energizer activities, snack and meal breaks often allow learners to have some time to themselves.

❍ When learners are hungry or thirsty, they may no longer be able to focus on learning.

❍ Snack and meal breaks also provide a designated time for participants to use the bathroom, smoke, make phone calls and perform other short tasks. This can reduce the disruption of learners exiting and entering the training room at different times.

❍ This unstructured time is important for learners to relax and may help them process the information that has been presented.

3. Introduce the topic of icebreakers.

● Review the purpose and use of icebreakers.

❍ Icebreakers are warm-up activities that allow participants to get to know each other and their trainer at the beginning of a training session.

❍ At the beginning of each day of the training course, icebreakers can help focus learners' attention on the course, introduce the training topic and prepare participants to learn.

❍ Icebreakers help the trainer relax and get acquainted with participants and encourage interaction between participants by engaging them in fun, meaningful activities.

● Remind the group of the icebreaker activities they have participated in thus far in the training course.

● Post flipchart: How Icebreakers Influenced You. Ask the group to share how the icebreakers used thus far in the training course influenced their mood, their comfort within the group and their readiness to learn the training topic. Write their responses on the flipchart.

● If necessary, add the following:

❍ Build trust among learners, and between learners and trainers.

❍ Help learners relax and be spontaneous.

❍ Encourage interaction between participants.

❍ Help learners overcome shyness and begin to build rapport with each other.

❍ Get energized and excited about the training.

❍ Set a participatory tone for the course.

❍ Identify the resources and talents each participant has to offer.

4. Introduce the topic of energizers.

● Define the purpose and use of energizers.

❍ Energizers are short, fun activities that, like icebreakers, are designed to help learners maintain energy and focus throughout a training course.

❍ Energizers often illustrate concepts and ideas that are linked to the content of a training course.

❍ Some energizers are not related to the training content. These may include activities as simple as asking participants to stand up and stretch.

❍ In addition to increasing energy, energizers may help create an emotionally safe learning environment. Energizers do this by helping learners to:

• Build trust.

• Get better acquainted.

• Relax during intense training.

• Reveal talents and skills that may not be expressed during other parts of the training, such as their creative or athletic abilities.

● Remind the group of the energizer activities they have participated in thus far in the training course.

● Post flipchart: How Energizers Influenced You. Ask learners to share how the energizers used thus far in the training course have influenced their motivation to learn, their energy and their comfort within the group. Record their responses on the flipchart.

  ❍ Point out that some of these responses may be similar to the results from the icebreaker brainstorm.

5. Introduce the topic of closing activities.

● Define the purpose and use of closing activities.

  ❍ Create emotional closure at the end of a training course.

  ❍ Help participants productively channel the emotions they have about the course ending, which could vary from regret, loss, sadness or relief.

  ❍ Help participants come to terms with the end of the intimacy they shared with the trainer and other learners.

  ❍ Create an opportunity for learners to articulate their accomplishments and commit to applying the knowledge, attitudes and skills they gained in the course.

● Closing activities should:

  ❍ Allow sufficient time so learners do not feel rushed at the end of the course.

  ❍ Provide an opportunity for participants to assess and articulate what they have learned and accomplished.

  ❍ Allow time to recognize every person's contributions.

6. Explain that while icebreakers, energizers, closing activities and breaks are important elements of all training courses, the appropriateness of a particular activity may vary according to the group of learners.

● Post flipchart and ask learners to respond to the question: What to consider when choosing icebreakers, energizers and closing activities. Record responses on flipchart.

● Learners responses should include:

  ❍ Training course goals and objectives.

  ❍ Participants' expectations of their roles.

  ❍ Amount of time available.

  ❍ Participants' cultural and training norms.

○ Atmosphere in the training setting.

○ Trainer's style and preferences.

● Explain that when selecting icebreakers, energizers and closing activities, trainers should consider the desired effect of the activity, as well as possible negative outcomes.

○ Consider the characteristics of learners, as well as the training environment and the program material. The learning preferences and style of a trainer may differ greatly from those of the participants.

○ Avoid activities that might cause disagreements, rather than build rapport, as well as activities that are likely to provoke embarrassment for shy participants.

○ Test icebreakers and energizers with other trainers before using them during a training course.

7. Thank the group for their participation.

● Refer them to pages 77-79 of their reference manual for more information on the importance of regular breaks, icebreakers, energizers and closing activities. Let them know the Appendix contains sample icebreakers, energizers and closing activities.

8. Link to next session.

We covered the importance of icebreakers, energizers and closing activities in this session, and now in the next session we will discuss the golden rules of training.

Purpose:

This session introduces the golden rules, or key concepts, of training that trainers should keep foremost in their minds as they plan and conduct a training course to increase the likelihood that the course will be effective.

Objectives:

At the end of this session, learners will be able to:

1. Identify and describe the golden rules of training

2. Explain how they can use these rules as a guide when planning and conducting effective training courses

Materials:

❏ Four cards prepared with golden rules

❏ Handout: Golden Rules of Training

Advance Preparation:

❏ Prepare Golden Rules of Training cards by copying, cutting and pasting three rules and their descriptions from these instructions on a large index card or piece of thick paper (one card will need to have four rules)

❏ Copy handout: Golden Rules of Training

Total Time: 60 minutes

Instructions:

1. Introduce the session: Golden Rules of Training.

   ● Acknowledge that a tremendous amount of time and skill is required to plan and implement an effective training course.

   ● Explain that while there are numerous factors to consider when planning and conducting a training course, there are a few golden rules that trainers should keep in mind to guide them through the process.

2. Facilitate the golden rules activity.

55 minutes

   ● Give the general activity instructions and divide learners into small groups to prepare their presentations.

   ❍ Explain that small groups will prepare a creative visual presentation on several golden rules of training without using any words, and the large group will try to guess what the rules are.

   ❍ Divide learners into four small groups and distribute one Golden Rules of Training card to each group.

   ❍ Ask groups to take 10 minutes to discuss the rules on their card

and prepare a creative visual presentation to describe each rule without using any words. The presentation could be a skit, role play, song, dance, picture or other creative presentation, as long as it does not include any words. Each group should plan on 10 minutes to present all of their rules to the large group.

● Card one:

❍ Be clear what you are trying to accomplish.

  • Present the learning objectives at the beginning of the training course so learners know what is expected of them and what they should know and be able to do at the end of the course.

❍ Less is more.

  • Trying to do too much in a training course may leave learners feeling overwhelmed and less competent than they did before the training. It is better to spend more time on fewer topics so learners have adequate time to absorb and reflect on new information and to practice new skills.

❍ Ask, don't tell.

  • Instead of telling learners what they need to know, get them actively involved in the learning process by asking them to share experiences and perspectives, posing discussion questions, and encouraging participation in learning activities. Learners will be more likely to remember new information and apply it outside of the training if they discover it themselves rather than have it told to them.

● Card two:

❍ It's not about you.

  • Remember, the training course should be learner-centered, not trainer-centered. As a trainer, the point is not to demonstrate how knowledgeable or skilled you are regarding the topic at hand. Instead, your role is to ensure that the learners are meeting the course objectives.

❍ Appreciate diversity.

  • Everyone comes to a training course with diverse life experiences and perspectives. Encourage learners to participate and interact so that they can learn from each other. Also, remember the four adult learning styles and incorporate methods that will resonate with all types of learners.

❍ Practice makes perfect.

  • Integrate opportunities throughout the training course for learners to apply new knowledge and practice new skills.

The more comfortable they become with new information or skills during a training course, the more likely they will use them outside of the training.

● Card three:

❍ Simple to complex.

● Start with simple information or skill-building activities, allowing learners to develop confidence in their understanding of the information or their ability to perform the skill, then gradually add new, more complex information or skill development steps. Always try to build on existing knowledge and skill levels.

❍ Safe to risk-taking.

● Avoid sensitive or emotionally charged topics and activities that may place a learner in a position outside of his or her comfort zone early in the training course. Start with safe activities that foster trust and information-sharing among group members; gradually integrate risk-taking activities, such as role plays, and sensitive topics as the training progresses.

❍ Group supported to solo.

● Start with activities that encourage group members to help each other uncover new information and develop new skills. Gradually move towards activities that require independence as learners become more comfortable with their grasp of the content and skills.

● Card four:

❍ Repetition of facts and skills in diverse and interesting ways.

● Enable learners to develop mastery over new information and skills by creating various opportunities for that information to be repeated and those skills to be practiced.

❍ Don't do what the learner can do; don't decide what the learner can decide.

● As appropriate, let go of having complete control of the group. Allow the learners to be in charge of their own learning and support newfound autonomy that occurs with the mastery of new information and skills.

❍ Consider use of other training materials and methods.

● Always think about the learning needs of the group and adapt training curricula and activities to best foster learning among the group.

❍ Honor cultural factors.

- Tailor training activities to honor local traditions and customs to make the training course relevant to and respectful of the learners.

● Distribute handout: Golden Rules of Training.

● As the small group presents each rule, the large group will try to guess what it is.

❍ If after several minutes the large group has not successfully guessed the rule, ask the small group to name the rule and move on to the next one.

● After the small group has presented their rules, they will name and describe them all for the large group.

● Facilitate a discussion about the activity by asking the following questions:

❍ What did you learn from this activity?

❍ Which of these golden rules do you already practice as a trainer?

❍ What were new rules for you?

❍ How can you use these golden rules to guide you as you plan and facilitate effective training courses?

3. **Thank the learners for their creative presentations and summarize the main points in the session.**

● Suggest that they refer to the golden rules when they are planning a training course to ensure they are on the right track.

4. **Link to the next session.**

Now that we have discussed the golden rules of training, let's move to the next session where we'll cover the steps of planning an effective training course.

Golden Rules of Training

Be clear about what
you are trying to
accomplish

Less is more

Ask, don't tell

It's not about you

Appreciate diversity

Practice makes perfect

Simple to complex

Safe to risk-taking

Group supported to solo

Repetition of facts and skills in
diverse and interesting ways

Don't do what the learner can do;
don't decide what the learner can decide

Use different training materials and methods

Honor cultural factors

Planning an Effective Training Course

Purpose:

The purpose of this session is for learners to explore the characteristics of an effective training course, the 12 steps that guide the process of planning an effective training course and the rationale and key components of each planning step. Learners will practice applying the 12 planning steps to design a training course for a specific audience and training need.

Objectives:

At the end of this session, learners will be able to:

1. Describe the characteristics of an effective training course

2. List the 12 steps to planning an effective training course

3. Discuss the rationale and key components of each step

4. Articulate strategies for coping with common challenges that arise at each planning stage

5. Design a training course using the 12 planning steps

6. Articulate strategies for coping with resource and time constraints when planning a course

7. Identify the unique training needs of a specific audience

8. Tailor training courses to meet the needs of a specific audience

Materials:

❏ Reference manual

❏ Flipchart

❏ Tape

❏ Markers

❏ 12 Planning Steps cards

❏ Prizes

❏ Worksheet: 12 Steps for Planning a Training Course:
  Small Group Research

❏ Handout: Completing the 12 Planning Steps

❏ Case Studies

❏ Chime

Advance Preparation:

❏ Label flipchart: Characteristics of Effective Training Courses

❏ Prepare Planning Steps cards: one set of 12 cards with planning step

on each one for each small group (can copy and paste from reference manual onto index cards or just copy and cut page into strips). Be sure to remove numbers when you cut out steps.

❑ Copy worksheets: 12 Steps for Planning a Training Course: Small Group Research (one packet of handouts for steps 1-12 for each participant)

❑ Copy handout: Completing the 12 Planning Steps

❑ Copy Case Studies

❑ Optional: Develop a case study that is tailored for your learners, using the ones here as examples

Total Time: 3 hours 5 minutes

Note to trainers: Although breaks have not been scheduled into this session, trainers will need to provide learners with time for breaks during the session.

5 minutes

Instructions:

1. Introduce the session: Planning an Effective Training Course.

● Provide an overview of effective training courses.

❍ Effective courses include a mix of approaches, methods and materials to ensure:

• The course is meeting learners' needs and expectations.

• Participants meet learning objectives.

• Activities are relevant and appropriate for the contexts in which learners live and work.

❍ Training courses come in many shapes and forms.

❍ There are group-based courses such as workshops and self-directed courses that learners complete by themselves or with the support of a trainer or coach.

❍ Courses may utilize a variety of methods, including didactic methods such as lecture and more participatory methods such as group discussions, role plays, case studies and games.

❍ These different approaches and methods have their own strengths and appropriate uses.

❍ The process of designing effective courses involves the selection of training approaches, methods and materials that best help learners meet course objectives, while working within time and resource constraints.

● Provide an overview of the session.

❍ In this session the group will explore the process of planning an effective training course, which we have divided into 12 key planning steps.

Before we discuss the process of planning a course, let's review the characteristics of an effective training course.

2. Review the characteristics of effective training courses.

● Post flipchart: Characteristics of Effective Training Courses.

● Separate learners into pairs.

● Ask each pair to take three minutes to reflect on effective courses in which they have participated either as learners or trainers and to discuss the characteristics of these courses that contributed to their success (for example, trainer was an engaging facilitator, the course started and ended on time, course content met participants' needs).

● After three minutes, ask pairs to stop working and ask for volunteers from several different pairs to share some of their ideas.

● Write each new characteristic on the flipchart.

● Ask learners to open their reference manuals to page 35 and ask a volunteer to read aloud the characteristics of effective training courses listed there.

● Check off items on the flipchart that match characteristics listed in the manual and remark on similarities and differences between the lists.

● Transition to next step:

❍ *Every trainer uses a different process to plan their courses, but there are certain key steps that each trainer should complete as they plan.*

❍ *In the next part of the session, we are going to explore the 12 key steps of this planning process.*

3. Facilitate card-sorting race with 12 planning steps.

● Provide instructions for the activity:

❍ Learners are going to work in groups of three to compete in a race against each other to see which group can put the 12 planning steps in correct order first.

❍ Each group will receive a set of cards with the 12 planning steps that have been mixed up.

❍ When the trainer tells them to start, they will discuss each card and put them in the order they believe is correct.

❍ When they think that they have put the cards in the correct order, all group members should raise their hands and the trainer will verify that they have correctly ordered the steps.

15 minutes
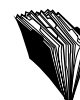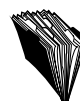
55 minutes

❍ The first group who puts the steps into the correct order will receive a prize.

● Use a creative method to divide learners into small groups and have them sit at different tables.

● Tell groups when to start playing and circulate around the room to check on them.

● When one group has correctly ordered the steps, declare the race over and announce the winning group.

● Ask the winning group to read the 12 steps aloud.

● Give prizes to the members of the winning group.

● Ask learners to refer to their reference manual page 36 for a checklist of the 12 steps for planning a training course.

● Emphasize that each trainer uses his or her own process to plan courses. Trainers may not always complete all of the steps in the same order, but there are certain steps that must be completed, and certain steps that need to be completed before other steps.

❍ For example, it is important to determine the purpose of a course and the needs of the learners before selecting trainers, training methods and materials.

4. Facilitate small group research on rationale and key components of 12 planning steps.

● Explain activity to learners.

❍ Learners will work in same groups of three and assign roles of recorder, reporter and timekeeper.

❍ Each group will use the reference manual pages 37-81 and take 20 minutes to research and write about the rationale and key components of their assigned planning steps.

❍ Using their own experience as trainers and learners, groups will develop strategies for coping with a common issue or challenge that trainers face when completing these steps.

❍ Although each group member may write their own notes, the recorder will compile the group's responses on one worksheet.

❍ After 20 minutes, the reporter from each small group will take no more than three minutes to report back to the larger group on the highlights of their group's research results.

● Ask learners to return to their same groups of three and same tables.

● Divide the 12 steps among small groups, assigning an appropriate number to each group (for example, group one will discuss and report

45 minutes

on steps one, two and three; group two will report on steps four, five and six, etc.).

● Distribute worksheet packets: 12 Steps for Planning a Training Course: Small Group Research. Give a packet to every learner and ensure each learner has the reference manual.

● As groups work, circulate around the room and offer assistance as needed.

● Alert groups when they have five minutes remaining.

● After 20 minutes, ask learners to finish.

● Remind learners that now each group reporter has three minutes to share highlights from their group's research on their assigned steps. Encourage reporters to be brief by only sharing one or two responses from each question for each step.

● Remind learners to use their worksheets to take notes as other groups present.

● Once all groups have reported, ask learners what additional ideas on planning training courses they would like to share with the group. Limit discussion to five minutes.

5. Review key aspects of course design.

● Explain the following points about course design to learners:

   ❍ Designing an effective course requires careful planning.

   ❍ Match course objectives and learners' needs with appropriate training methods, materials and approaches.

   ❍ Structure courses to maximize the transfer of training.

   ❍ Use informal and formal evaluation to make mid-course adjustments, measure participant satisfaction and learning, and assess knowledge retention and skills transfer after training.

● Review management of resource and time constraints:

   ❍ Use multi-site training to reduce the amount of time learners are away from their worksites/communities.

   ❍ Mix learning approaches — complement group-based learning with self-guided learning.

   ❍ To cope with time constraints, limit objectives and link learners to ongoing training opportunities.

   ❍ Do not abandon participatory methods because of time limits.

● Refer learners to the reference manual for more information.

   ❍ Rationale and key components for completing each planning step
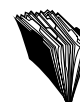
5 minutes
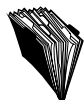
❍ Case studies that illustrate the application of training design principles in reproductive-health courses.

❍ Training tips with recommendations for best practices and strategies for coping with training challenges.

❍ Sample tools in Appendices for completing course planning, including needs assessments, evaluation tools, etc.

6. Introduce topic: practice planning a course for a specific audience.

● Explain the activity.

❍ Developing and conducting an effective training course requires going through a careful assessment and planning process.

❍ One of the most important aspects of this planning process is to tailor training courses to meet the needs and strengths of each group of learners.

❍ We are going to practice using the 12 Planning Steps to design a training course to meet the needs of a specific audience.

❍ We will divide into the same small groups.

❍ Everyone will receive the same case study that includes information they will need to design a training course for a specific audience.

❍ Each group will complete their same assigned planning steps (from the last activity) to help design a course for this audience and training need.

❍ Use handout: Completing the 12 Planning Steps to guide you as you complete your steps. For example, group one will complete Planning Step 1: Defining the purpose of a course. To complete this step, the group will write a sample purpose statement for the course.

❍ Each group will have 25 minutes to complete the exercise.

❍ After 25 minutes, each group will share information about their completed planning steps with the whole group by writing their responses on a flipchart.

● Facilitate small-group activity.

❍ Divide learners into same small groups.

❍ Distribute the case study and handout: Completing the 12 Planning Steps to each participant.

❍ Remind learners that they have 25 minutes to complete the activity.

❍ Circulate and help groups as needed.

❍ After 15 minutes, bring flipchart paper to each group and ask them to prepare their posters.

❍ Remind groups when they have five minutes remaining.

❍ Ask each group to hang their posters on the wall in sequential order 1-12.

● Provide instructions for gallery walk.

❍ Ask learners to take 10 minutes to walk around and look at the posters, which outline the steps of the planning process they would use when designing a course to meet the needs of this audience.

● Facilitate a discussion by asking questions.

❍ *What comments do you have about the way any of the groups completed their step?*

❍ *What did you learn from this activity?*

❍ *How can we apply these skills to our work as trainers?*

7. Summarize and wrap up the session.

5 minutes

● Thank learners for their insights and participation.

● Review the key points of tailoring a course for a specific audience and training need.

❍ Assess the needs of the learners as well as resource and time constraints.

❍ Select training site, approaches, methods and materials to meet their needs.

❍ Develop strategies for coping with resource and time constraints.

• Blended training approaches: complement group time with self-study involving a trainer/coach.

• Multi-site training approaches: combine group-based training at a central site with individualized training and support in the workplace and community.

8. Link to next session.

Now that we have covered the steps to plan an effective training course, including the step of selecting appropriate trainers, we will discuss effective training in teams.

12 Steps for Planning a Training Course: Small-Group Research

Rationale: Why is it important to complete this step?

Answers:

Key Component: What are key questions and issues you need to consider as you complete this step?

Answers:

Key Component: What key actions do you need to take to complete this step successfully?

Answers:

Training Best Practices: How can you determine whether or not training is the correct intervention?

Recommendations:

12 Steps for Planning a Training Course: Small-Group Research

Step Two: Define the needs of participants

Rationale: Why is it important to complete this step?

Answers:

Key Component: What are key questions and issues you need to consider as you complete this step?

Answers:

Key Component: What key actions do you need to take to complete this step successfully?

Answers:

Training Best Practices: When and how should you assess participants' needs?

Recommendations:

12 Steps for Planning a Training Course: Small-Group Research

Step Three: Define training objectives

Rationale: Why is it important to complete this step?

Answers:

Key Component: What are key questions and issues you need to consider as you complete this step?

Answers:

Key Component: What key actions do you need to take to complete this step successfully?

Answers:

Training Best Practices: How can you ensure your training course objectives are SMART (Specific, Measurable, Achievable, Relevant, and Time-based)?

Recommendations:

12 Steps for Planning a Training Course: Small-Group Research

Step Four: Select the appropriate training approach

Rationale: Why is it important to complete this step?

Answers:

Key Component: What are key questions and issues you need to consider as you complete this step?

Answers:

Key Component: What key actions do you need to take to complete this step successfully?

Answers:

Training Best Practices: What are mixed learning approaches and why should you use them?

Recommendations:

12 Steps for Planning a Training Course: Small-Group Research

Step Five: Select trainers

Rationale: Why is it important to complete this step?

Answers:

Key Component: What are key questions and issues you need to consider as you complete this step?

Answers:

Key Component: What key actions do you need to take to complete this step successfully?

Answers:

Training Best Practices: What are the benefits of using guest trainers?

Recommendations:

12 Steps for Planning a Training Course: Small-Group Research

Step Six: Select the training site

Rationale: Why is it important to complete this step?

Answers:

Key Component: What are key questions and issues you need to consider as you complete this step?

Answers:

Key Component: What key actions do you need to take to complete this step successfully?

Answers:

Training Best Practices: What are multi-site training approaches and what are some effective ways to use them?

Recommendations:

12 Steps for Planning a Training Course: Small-Group Research

Step Seven: Determine the length of the training course

Rationale: Why is it important to complete this step?

Answers:

Key Component: What are key questions and issues you need to consider as you complete this step?

Answers:

Key Component: What key actions do you need to take to complete this step successfully?

Answers:

Training Best Practices: How should trainers cope with time constraints?

Recommendations:

12 Steps for Planning a Training Course: Small-Group Research

Rationale: Why is it important to complete this step?

Answers:

Key Component: What are key questions and issues you need to consider as you complete this step?

Answers:

Key Component: What key actions do you need to take to complete this step successfully?

Answers:

Training Best Practices: What are some of the benefits of using participatory training methods?

Recommendations:

12 Steps for Planning a Training Course: Small-Group Research

Step Nine: Select and adapt training media and materials

Rationale: Why is it important to complete this step?

Answers:

Key Component: What are key questions and issues you need to consider as you complete this step?

Answers:

Key Component: What key actions do you need to take to complete this step successfully?

Answers:

Training Best Practices: What are some characteristics of effective training media?

Recommendations:

12 Steps for Planning a Training Course: Small-Group Research

Step Ten: Prepare plan for transfer of training

Rationale: Why is it important to complete this step?

Answers:

Key Component: What are key questions and issues you need to consider as you complete this step?

Answers:

Key Component: What key actions do you need to take to complete this step successfully?

Answers:

Training Best Practices: What are two techniques for facilitating the transfer of training?

Recommendations:

12 Steps for Planning a Training Course: Small-Group Research

Step Eleven: Prepare plan for evaluation

Rationale: Why is it important to complete this step?

Answers:

Key Component: What are key questions and issues you need to consider as you complete this step?

Answers:

Key Component: What key actions do you need to take to complete this step successfully?

Answers:

Training Best Practices: When should trainers conduct evaluations?

Recommendations:

12 Steps for Planning a Training Course: Small-Group Research

Step Twelve: Develop the training course plan

Rationale: Why is it important to complete this step?

Answers:

Key Component: What are key questions and issues you need to consider as you complete this step?

Answers:

Key Component: What key actions do you need to take to complete this step successfully?

Answers:

Training Best Practices: Why include breaks in a course schedule?

Recommendations:

Completing the 12 Planning Steps

Planning Step	To complete this step:
1. Define the purpose of the training: Why are you conducting the training?	Write a statement of purpose for the course.
2. Define the needs of participants: Who are the learners? What skills and experience do they already have? What are their learning needs?	Define your audience and their learning needs.
3. Define training objectives: What do you want the learners to know and be able to do at the end of the course?	Develop a set of learning objectives for the course.
4. Select the appropriate training approaches: Should training be conducted in groups, individually or through a combination of both approaches?	Make recommendations for the approaches that should be used to complete this course.
5. Select trainers: Who are the most appropriate people to provide training on this content, with this audience and using this approach?	Describe an appropriate team of trainers for the course.
6. Select training site: Where is the most appropriate place to conduct this training course?	Make recommendations for the appropriate training site.
7. Determine the length of the training course: How long should your course be?	Make recommendations for length of this course.
8. Select training methods: What mix of methods will help meet learners' needs?	Make a list of methods that trainers might use to accomplish different learning objectives.
9. Select and adapt training media and materials: What mix of training media will best meet the needs of this group of learners?	Describe media and materials that would be appropriate for this course.
10. Prepare plan for transfer of training: How will you help learners apply their new knowledge and skills when they leave the training?	Make recommendations for strategies to ensure transfer of training.
11. Prepare plan for evaluation: How will you know if the training was effective?	Make a list of evaluation methods to be used during this course.
12. Develop the training course plan: Plan the agenda, prepare the materials and arrange the logistics.	Prepare a sample agenda for the first day of the course, including breaks, icebreakers, energizers and daily evaluation activities.

Designing an Effective Training Course

Case Study 1

A nongovernmental women's health organization has asked your training team to design a course to build community health workers' (CHW) skills to provide community education and clinical referrals for women at risk of or experiencing complications from incomplete or unsafe abortion. A team of nurse midwife trainers will facilitate the course for 100 CHWs in two provinces. The CHWs have a range of very low to moderate literacy levels.

The CHWs have already been trained in community outreach and education techniques, contraception, family planning and HIV. They have not received any prior training on abortion and resulting complications, and have little knowledge about medical interventions for women who have experienced abortion complications. They also have little information about facilities that offer PAC services for women or ways to facilitate access to these services. In previous training courses, a number of the CHWs have expressed the desire to set up emergency transport systems for women, but have little information about how to do so.

After the training, the CHWs will be expected to:

- Conduct individual and group education on unsafely induced and spontaneous abortion and symptoms of complications.
- Mobilize communities to establish emergency transportation systems.
- Facilitate access to care for women with symptoms.
- Provide home-based follow-up care including postabortion counseling, self-care instructions, contraceptive method re-supply (if desired) and referrals to additional services (if needed).

Case Study 2

The Ministry of Health (MOH) has asked your training team to design a course to improve the family-planning services in 20 of its rural health posts in one province. There is a large unmet need for contraceptive methods in these areas. Two trained nurses offer primary care, including family-planning services, at each health post.

The nurses have received adequate training on contraceptive methods, but limited training on contraceptive counseling and follow-up care. The health posts usually have an adequate supply of contraceptive methods. The nurses receive little supervision or support. They report that they enjoy getting away from their sites and socializing with their colleagues. Because the nurses are usually the only clinicians at their sites, the MOH wants them to stay at their sites as much as possible throughout the training so services are not disrupted. There is one conference center in the province, which is often used by groups of tourists and development workers.

By the end of the training, the MOH would like these nurses to be competent to provide comprehensive reproductive-health counseling, contraceptive method provision, follow-up care, and referral to other sexual- and reproductive-health services.

Designing an Effective Training Course

Case Study 3

A women's rights group has asked your team to organize a training course for a group of 20 health administrators who will be attending a conference. In this particular country, women have a legal right to terminate pregnancy in the case of rape. Obstacles in the health and judicial systems – as well as both women's and health-care providers' lack of knowledge of the law – often impede their ability to obtain legal abortion in such cases.

These administrators have very little knowledge about the legal indications for abortion. Recently, several high-profile cases highlighting this critical gap in knowledge have raised the administrators' interest and concern about this issue. At least several of them have expressed a desire to learn ways that they can increase access to legal abortion services.

The women's rights group hopes that by the end of the training, you will:

- Sensitize the administrators to the problem of sexual violence.
- Increase their knowledge about the legal indications for abortion in the case of rape.
- Provide them with a model of comprehensive abortion services for victims of sexual violence, including legal, medical and psychosocial services.
- Build participants' skills for advocating for the provision of these services in their facilities.

The group wants each participant to leave the course with a comprehensive action plan for establishing, maintaining and monitoring services in their facilities.

The administrators are available for a two-hour course. You are concerned that you might not have enough time to meet all of these objectives.

Case Study 4

A major medical products distribution company has asked your clinical training team to conduct a half-day sales training on MVA for 30 of their sales representatives. While you have not conducted a formal needs assessment of these learners, you know that the sales representatives all have years of experience marketing medical products.

By the end of your training, these salespeople should be able to effectively communicate with health-care providers about the benefits and use of MVA for both providers and clients. Salespeople should be able to provide a simulated demonstration of MVA use without demonstrating on pelvic models or live patients. From experience, you know that salespeople will be most successful in representing this product to providers if they are able to make effective presentations. They also need to supply providers with educational materials.

These salespeople will not provide clinical training to providers, but you want them to help you identify providers who are interested in receiving clinical training, as well as share information with providers about opportunities for training.

Purpose:

The purpose of this session is to educate learners on how to work effectively in a training team.

Objectives:

At the end of this session, learners will be able to:

1. Identify the advantages of training in teams

2. Provide examples of strategies for training effectively in teams

3. Describe the purpose of co-trainer debriefing sessions

4. Provide examples of appropriate questions to ask during a co-trainer debriefing session

Materials:

❑ Flipchart

❑ Markers

❑ Ball

❑ Reference manual

Advance Preparation:

❑ Label flipchart: Benefits of Training in Teams

❑ Prepare flipchart: Effective Co-trainers … (see Instructions for flipchart content)

❑ Label flipchart: Strategies for Training Effectively in Teams

Total Time: 20 minutes

1. Introduce the session: Training in Teams.

● Explain that there are many benefits to working as a team with co-trainers.

10 minutes

We are going to reflect on some of the ways that training in teams increases the quality and effectiveness of training courses. We are also going to discuss some guidelines for working effectively with other trainers.

● Ask learners to stand in a circle, but do not join the circle yourself.

● Explain that learners will pass a small ball around the circle. Learners will toss the ball to each other in no particular order. Whenever a learner catches the ball, he or she should offer an idea about the benefits of training in teams.
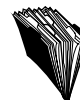
● Post flipchart: Benefits of Training in Teams. Explain that you will write down each idea.

● Give the ball to a learner. Ask the learner who is holding the ball to suggest one way that they believe training in teams may increase training quality and effectiveness.

● Once the learner has shared an idea, prompt him or her to toss the ball to another learner.

● Write down learners' ideas on the flipchart.

● Add the following ideas to the flipchart as needed:

❍ Exposes learners to a variety of training styles.

❍ Reduces trainer fatigue by allowing trainers to share tasks.

❍ Eases facilitation of sessions and supervision of small-group work.

❍ Allows learners to benefit from different trainers' skills and expertise.

❍ Allows co-trainers to problem-solve together.

❍ Allows co-trainers to provide constructive feedback to each other throughout a training course.

● Ask the learners to return to their seats.

2. **Facilitate discussion on working effectively with co-trainers.**

● Explain that while there are many benefits to training in teams, successful co-training requires planning, communication and collaboration between co-trainers.

● Post flipchart: Effective Co-trainers.

❍ Work to establish respectful, collaborative working relationships.

❍ Enter into new training courses with clearly defined roles and shared expectations about how to conduct training courses.

❍ Resolve difficult situations that may arise during training courses

● Post flipchart: Strategies for Training Effectively in Teams.

● Ask learners to share several strategies for training effectively in teams. Write their ideas on flipchart. Add the following key points to the list, as necessary. Verbally provide the examples in italics.

❍ Agree before the course how to manage potentially disruptive situations:

• *How to intervene if a trainer forgets an important point.*

• *How to manage challenging learner behaviors.*

• *How to warn each other if the pace of training is too fast or too slow.*

• How to alert each other when a session or presentation is running over its scheduled time.

❍ Before the course, identify opposing perspectives and establish ways to communicate about them with learners:

For example, if one trainer believes that abstinence is the best way to avoid HIV and other sexually transmitted infections, while another favors education and condom distribution to ensure correct and consistent use of condoms, the trainers should work to ensure that learners understand there are different options for prevention and that the trainers are not competing to promote their views.

❍ Give each other your full attention, even when it is not your turn to facilitate.

❍ Set aside time at the end of each training day to debrief and discuss any issues or concerns that arose.

❍ Develop plans to make necessary adjustments to the training course agenda.

● Refer learners to page 53 of their reference manual for a handout that summarizes some of the benefits of and guidelines for co-training.

● Direct learners to page 134 of their reference manual for the Co-trainer Debriefing Form. Explain that these are some questions co-trainers can use at the end of the day to initiate discussion about issues and concerns that arose during the training session, as well as appropriate adjustments that need to be made. This activity is called "debriefing."

● Ask learners what other debriefing questions they have found helpful.

● Tell learners that the lead trainers of this training course meet at the end of every day to reflect on the day and make necessary adjustments to the course.

3. Thank the group for their great ideas and link to next session.

Now that we have discussed effective training in teams, we will move on to discuss how to handle difficult situations.

Purpose:

The purpose of this session is to help prepare learners to handle difficult situations by sharing strategies for how to respond to them.

Objectives:

At the end of this session, learners will be able to:

1. Describe solutions for dealing with disruptive or difficult situations as a trainer
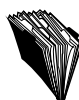
Materials:

❑ Blank paper

❑ Markers (one for each small group)

❑ Difficult Situation cards

❑ Reference manual

Advance Preparation:

❑ Copy and cut out Difficult Situations cards

Total Time: 35 minutes

Instructions:

1. Introduce the session: Handling Difficult Situations.

   ● Explain that in almost every training course an unexpected event will occur that is either disruptive to the group or difficult to handle.

      ❍ A trainer's ability to deal effectively and efficiently with these situations will ensure that the flow of the training is not disrupted and the training content is not affected.

      ❍ This session will provide learners with an opportunity to consider how they would respond to various difficult or disruptive situations.

2. Introduce the brainstorming activity

   ● Tell learners they will divide into small groups, assigning a reporter, recorder and timekeeper.

      ❍ You will be passing out cards that each present a different disruptive or difficult situation. Four of the cards describe common disruptive situations and one card is blank so that learners can use it to share a difficult situation that they have coped with in the past.

5 minutes

25 minutes

❍ The groups will use the cards to brainstorm potential solutions to these problems.

❍ Each group will get one set of cards. They should lay the cards on the table with the difficult situation face up so they cannot see the possible solutions.

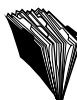❍ Members of each group will take turns selecting a card and reading the situation to the other members of their small group without looking at the solutions on the back.

❍ Then the small group will discuss ways to handle that situation if it arose during a training course. The recorder will take notes on their ideas.

❍ Once the group has discussed all four situations, they will think of an example of a disruptive situation that one of their members encountered during a training course and brainstorm solutions. The recorder will write the situation on the front of the card and write solutions for managing the situation on the back of the card.

● Divide learners into small groups and have them complete the activity in 15 minutes.

❍ Use a creative method to divide learners into small groups.

❍ Pass out the Difficult Situation cards, blank paper and markers to groups.

❍ Remind learners they have 15 minutes to complete the activity; give them a two-minute warning.

❍ Trainers should circulate and provide support to groups as needed.

● Facilitate report-back and discussion.

❍ Ask each group reporter to share several solutions they developed to one of the four difficult situations as well as their unique fifth training situation and solutions.

❍ Allocate two minutes to each group.

❍ Ensure that each group presents a different situation.

❍ Once each group has presented, ask the other groups what additional strategies they have for handling the situation.

3. **Summarize the session and refer learners to their reference manual pages 27 and 33 for handouts on handling difficult situations.**

5 minutes

● Explain to learners that this is not an exhaustive list of possible disruptive or difficult situations.

● Encourage learners to take time when planning training events to always think about disruptive situations that are likely to come up during different courses and strategize about how they would manage them.

● Ask the group what other strategies they have for handling disruption and difficult situations.

4. Thank the group for their great solutions and link to next session.

Handling difficult and often unexpected situations is one of many skills we have learned during this course. Now we will move into the second part of this training course on clinical training and coaching skills.

Note to trainers: This is the final session of Part I. If you are not including Part II in this course, transition to closing and evaluation activities.
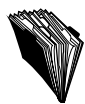
The electricity
goes out

Your co-trainer
gets sick the
day of training

Only half of the
learners have arrived
when the training is
supposed to start

The training
materials have
not arrived

Difficult Situation:

Difficult Situation:

D i f f i c u l t   S i t u a t i o n   C a r d s

Possible Solutions:

- Always try to review in advance both your role and your co-trainer's role

- Try to find a substitute

- Tell the learners and identify another time to cover those materials

- Refer the learners to other materials that cover the topic

- Involve learners by having them research and present sections of the co-trainer' material

Possible Solutions:

- Move training to another facility

- Move outdoors or to an area with natural light

- Lead learners in activities that are not dependent on audiovisuals

- When possible, during the event-planning stage, devise backup activities for teaching each topic without electricity

Possible Solutions:

- Let the learners know, and provide materials to them at a later time

- Always carry at least one copy of the training materials and manual with you, enabling you to make copies, if necessary

- Use the flipchart to write important points and instruction for activities

- Develop activities that can be completed without printed materials

- Involve the learners by asking them to present training topics in creative ways

Possible Solutions:

- Ask people who are there if they know of some reason the others might not be present. In cases where delays are unavoidable, such as when traffic is extremely bad or an earlier meeting ran late, you may wish to wait 15-20 minutes before starting

- Cultural differences regarding time are common, and it may be the norm in this culture to arrive late to events

- Be sure to reach agreement with the complete group on norms regarding beginning and ending times for training sessions

Possible Solutions:

Possible Solutions:

Individualized Clinical Training Approaches

Purpose:

The purpose of this session is to teach learners about effective, individualized clinical training approaches that can be used in a variety of settings and in conjunction with group-based training and clinical coaching.

Objectives:

At the end of this session, learners will be able to:

1. Articulate the essential components of three types of individualized clinical training approaches

2. Express potential barriers to carrying out these approaches

3. Describe what issues must be addressed to ensure that computer-assisted learning, supportive supervision and structured on-the-job training are conducted in an effective manner

Materials:

❑ Worksheet: Individualized Clinical Training Approaches

❑ Reference manual

Advance Preparation:

❑ Prepare Clinical Training Approaches worksheet in advance to be able to correct or add to small groups' responses.

Total Time: 1 hour

Instructions:

1. Introduce the session: Individualized Clinical Training Approaches.

● Explain to learners: In this session we are going to learn about three effective training approaches that can be used in conjunction with each other, with group-based methods and with clinical coaching, a topic we'll focus on later in the course.

We'll learn more about computer-assisted learning, supportive supervision and structured on-the-job training.

● Explain that these methods may be useful in meeting the individual needs and goals of a learner, particularly in light of varying contexts in which learners live and work, and the resource and time constraints learners may face.

● Describe that trainers, working together with learners, need to determine what methods or combination of methods may work best to meet the training goals.

5 minutes

Part II: Clinical Training Approaches and Coaching Skills

❍ A combination of group-based and individualized training approaches allows learners to benefit from the strengths of both forms of training, maximizing efficiency and impact.

2. Facilitate research activity on individualized clinical training approaches.

● Use a creative method to divide learners into three small groups. Ask groups to assign the roles of recorder, reporter and timekeeper.

● Ask each group to research a different individualized clinical training approach in their reference manual on pages 47-50 and complete the questions on their Individualized Clinical Training Approaches worksheets.

❍ The three approaches are: computer-assisted learning, supportive supervision and structured on-the-job training.

● Give groups 20 minutes to conduct the research on their topic(s), answer the worksheet questions and prepare a 10-minute (maximum) report to present to the large group.

● One at a time, ask small-group reporters to share highlights – not all of their group's answers – from their worksheet:

❍ The three most essential components of this clinical training approach.

❍ One positive and one negative experience with this training approach (alternatively, if no one in the group has had an experience with this approach, the reporter could present one positive and one negative aspect of this training approach based on what they know about the approach).

❍ Two of the barriers to implementing this type of training.

❍ The top three issues to address to ensure that this type of training is effective.

● As each group presents, ask the other learners to fill in their Individualized Clinical Training Approaches worksheets.

● After all groups are finished, ask the following discussion questions:

❍ *What did you learn from this activity?*

❍ *How can this information help us as trainers?*

3. Summarize the session.

● Explain that trainers need to determine what combination of effective clinical training approaches may work best in that setting to meet the training goals.

4. Link to next session.

Now that we have discussed different clinical training approaches, let's talk specifically about clinical coaching skills.

Individualized Clinical Training Approaches

	Computer-assisted learning	Supportive supervision	Structured on-the-job training
What are the essential components of this training approach?			
What positive personal experiences have you had with this training approach?*			
What negative personal experiences have you had with this training approach?*			
What are some of the barriers to implementing this training approach?			
What issues are important to address to ensure that this training approach is effective?			

* Alternatively, if no one in the group has had an experience with this approach, the group could discuss the positive and negative aspects of this training approach based on what they know about the approach.

Purpose:

The purpose of this session is to teach learners effective clinical coaching approaches and skills. Learners will observe, practice and then be evaluated on the effective coaching skills they would use to train health-care workers in both simulated and actual clinical settings.

Objectives:

At the end of this session, learners will be able to:

1. Articulate the purpose of effective clinical coaching of health-care workers

2. Describe the coaching process both in simulated model-based settings and actual clinical settings

3. Identify the characteristics of effective and ineffective coaching

4. Give and receive feedback effectively

5. Conduct effective clinical coaching in simulated and actual clinical settings

Materials:

❑ Flipchart

❑ Markers

❑ Effective Clinical Coaching: Competency Checklist

❑ Ineffective Clinical Coaching skit instructions and script

❑ Effective Clinical Coaching skit instructions and script

❑ Handout: Giving and Receiving Feedback (page 89)

❑ Materials for clinical coaching demonstration and small-group practice (for example, for MVA: pelvic model, speculum, tenaculum, gauze, antiseptic bowl, clear bowl for viewing tissue, forceps, MVA aspirator, cannula, gloves, syringe with hypodermic needle, needle extender (optional))

❑ Clinical Assessment checklists (MVA procedure clinical assessment checklist and sample postabortion family-planning counseling skills checklist on pages 142-143 of the reference manual)

❑ Optional: Ball; video recorders and equipment

Note to trainers: If using a different clinical procedure than manual vacuum aspiration (MVA) for the demonstration, the procedure needs to be the same for the Ineffective and Effective Clinical Coaching skits. You will need to prepare a new skit incorporating similar examples of ineffective and effective clinical coaching techniques. Likewise, if you are not using MVA for small-group practice, you will need to develop or obtain an appropriate clinical assessment competency checklist in advance. If you're using different clinical procedures for demonstration and small-group practice, you will need to gather the necessary materials for both.

Advance Preparation:

❏ Prepare flipchart: Model-Based Training Requirements with five bullet points

❏ Copy Effective Clinical Coaching: Competency Checklist (several copies per participant)

❏ Copy Ineffective and Effective Clinical Coaching Skit instructions and scripts

❏ Copy handout: Giving and Receiving Feedback

❏ Label flipchart: Ineffective Coaching

❏ Label flipchart: Effective Coaching

❏ Prepare possible responses for Ineffective and Effective Clinical Coaching skits

❏ If learners are not experienced with MVA use, develop another clinical coaching demonstration and small-group practice activity tailored to learners' existing clinical knowledge and skills

❏ Optional: Arrange clinical coaching practice in an actual clinical setting

Total Time: 4 hours 10 minutes

Note to trainers: The time needed for this session can vary greatly depending on the number of learners and the complexity of the clinical procedure chosen for small-group practice. This session will take much longer if optional activities are included or actual clinical practice is conducted.

Instructions:

1. Introduce the session: Clinical Coaching Skills.

● Explain that this session is about effective competency-based clinical training approaches and skills transfer with a focus on the coaching process in simulated, model-based training and actual clinical training settings.

> *During this session we will observe, practice and be assessed on clinical coaching skills and at the same time gain more practice giving and receiving feedback. The emphasis of this session is on the transfer of clinical skills acquisition to others, not the specific clinical skills themselves.*

● Explain that clinical coaching refers to the combination of goal-setting, active listening, questioning, positive feedback, problem-solving and evaluation techniques that trainers use to help trainees develop confidence and competence in new clinical skills. Through coaching, knowledge is transferred from trainers to learners in a manner that builds learners' self-esteem, as well as their skill set.

5 minutes

10 minutes

2. Facilitate icebreaker: Cross the World.

● Explain the activity to learners.

❍ Ask learners to bring their chairs to an empty space in the room and make a circle with the chairs facing towards the middle of the circle. Make sure that there is one less chair than the total number of people, including you. Have everyone except you sit in a chair.

❍ Explain that when you call out, "Cross the World!" everyone should run across the circle and sit in another chair. They cannot sit in a chair next to theirs. Tell them that you will also sit in a chair. Because there is one less chair than the number of people, someone will be left standing.

❍ The person standing must think back to a time when he or she was learning a new clinical skill and name one technique his or her trainer used that really helped the learner acquire the new skill. Give learners an example: *When I was learning how to insert an IUD, my trainer had me observe a skilled clinician insert an IUD several times before I tried it myself.*

❍ The standing person then calls out, "Cross the World" and sits in the nearest seat. All the other learners will run across the circle and sit in another chair. Again, the person left standing shares an experience with effective clinical training.

❍ Repeat several times.

● Optional: Use Ball Toss as an alternate icebreaker if room set-up is not conducive to Cross the World activity:

❍ Trainer tosses a ball to a participant and asks the person to think back to a time when she was learning a new clinical skill. Ask the participant to name one technique her trainer used that really helped her learn the new skill.

❍ Once that person has answered the question, she tosses the ball to another participant and he continues the sharing.

❍ Repeat several times.

Note to trainers: If learners have been sitting for a while and seem to be getting restless, it may be better to select the Cross the World activity, as it will allow them to move and become more alert.

3. Facilitate discussion and brainstorming on principles of effective coaching.

● Introduce the coaching process (10 minutes).

❍ Coaching is an essential skill for trainers who work with reproductive-health issues. It is both an approach to training and a specific activity that is carried out by trainers.

❍ Transfer of information and skill-building takes place in three phases of coaching:

• Demonstration: In the first phase, the clinical trainer/coach explains and performs the skill while the learner observes the demonstration.

• Practice: During the second phase, the learner practices the skill while the coach provides supervision and support. This phase can take place both in simulated settings and actual clinical settings.

• Evaluation: In the final phase, the coach evaluates the level of competency with which the learner can perform the skill according to a standardized protocol.

• This three-phased approach maximizes coaching to ensure that learners can perform new skills with a high level of competency.

❍ Coaching is meant to transfer a skill set from the clinical trainer to the learner through immediate feedback on the learner's performance, providing both positive reinforcement and suggestions for improvement.

● Next, discuss each phase of coaching in detail (30 minutes).

Now we'll discuss each phase in more detail.

❍ Ask the learners their ideas about each stage and fill in outstanding points that they may not mention before moving on to the next question.

❍ Introduce Phase 1: Demonstration.

❍ Ask learners: *Why is the demonstration phase important?* Answers should include:

• To correctly model the clinical procedure by an experienced clinician following a standardized performance protocol.

• To give learners a clear depiction of what the expected performance is when conducting the skill.

• To allow learners to observe and ask questions about the skill prior to practicing it themselves.
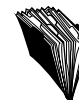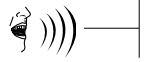
❍ Ask learners: *What does a trainer/coach need to know and do to conduct the demonstration effectively?*
Answers should include:

- Proficiency in the skill being taught according to the standardized protocol.

- Conduct the demonstration in a clear way that follows the standard procedure and allows enough time for learners to observe and understand each step of the skill.

- Demonstrate the skill in a realistic manner using actual materials to simulate the clinical setting as much as possible.

- Discuss the demonstration afterwards and allow sufficient time to answer questions and clarify concerns before moving on to the next phase.

❍ Introduce Phase 2: Practice.
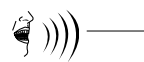
❍ Ask learners: *What specific roles does the coach have during the trainee's practice session?*
Answers should include:

- Helping the trainee set competency-based learning goals prior to beginning practice.

- Providing support and encouragement to the trainee in learning new skills.

- Actively listening to the trainee and asking questions to clarify and further learning.

- Providing timely, specific feedback – both positive reinforcement and concrete suggestions for improvements where needed – before, during and after practice.

- Helping the trainee learn to problem-solve difficult situations in clinical settings.
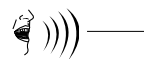
❍ Ask learners: *What are some differences in simulated clinical practice settings versus actual clinical practice settings?*
Answers should include:

- Simulated clinical settings often are model-based and help learners acquire new clinical skills while minimizing some of the drawbacks of practicing on actual patients (such as increasing the potential risk of complications or discomfort from less advanced clinicians

performing procedures on real clients).

- Simulated settings allow the trainee "hands-on" practice as many times as necessary to reach a level of proficiency high enough for the trainee to then move on to practicing on a patient.

- Several learners can practice on simulation models at one time and a coach can stop them at any point to provide feedback or instruction.

- Many observers can watch simulated practice while few observers should be in a procedure room with an actual patient.

- Coaches in actual clinical settings need to use less obvious ways (such as hand signals) of asking the trainee to stop or pause what they are doing so as to not alarm the patient.

- Coaches should refrain from interrupting or performing the skill for trainees during actual clinical practice sessions unless trainees are in danger of compromising the health and safety of the patient, in which case the coach must stop the trainee.

❍ Introduce Phase 3: Evaluation.

❍ Ask learners: *What are ways that coaches and trainees can evaluate a trainee's progress in learning a new skill?*
Answers should include:

- Determine trainee skill level and needs at the outset of the training through a training needs assessment or trainee skill inventory.

- Establish realistic learning goals and assess progress during the training.

- Provide the trainee with specific, helpful feedback throughout the learning process.

- Use competency-based clinical checklists to measure trainee performance by a standardized procedure and as a tool for providing feedback (this checklist can also be used to determine when the learner has become proficient in the skill).

● Discuss keys to model-based training and effective clinical coaching (30 minutes).

❍ Show flipchart: Model-Based Training Requirements and write the points below.

The success of model-based training depends on how much the models and learning environment sufficiently mimic the real clinical experience. To be effective, trainees need:

- Realistic models and sufficient practice time.
- Specific information on how the model may differ from an actual human.
- A setting that closely resembles the one in which the trainee will work.
- A coach who is as proficient with a model as a real patient.
- To become competent on the model prior to practicing on patients.

❍ Hand out and review Effective Clinical Coaching: Competency Checklist.

❍ Brainstorm keys to effective clinical coaching and write the answers on a blank flipchart. Be sure the following points are included and comment on these points as needed:

- Patient rights must always be respected in the actual clinical practice sessions.
- Follow the rule of "do no harm" at all times.
- Coaches should never be judgmental or insult trainees, but rather should always leave them feeling good about their learning process.
- Coaches should always strive to maintain trust with the trainee and promote trust between the trainee and the patient.

4. Facilitate skits that demonstrate ineffective and effective coaching.

● Introduce the ineffective coaching demonstration (30 minutes).

❍ You can describe the skit scenario briefly to the large group and ask two learners to act out the described roles.

We're going to do a skit about ineffective clinical coaching. In this skit, we have people playing three roles. I am playing the coach, one participant will play the clinical trainee and one will play the patient. For learning purposes, we are going to demonstrate ineffective coaching practices. While we do the skit, please write down practices you observe that you think are ineffective on your Effective Clinical Coaching Competency Checklist. After the skit, we'll discuss our findings.

❍ Ask one learner to play the role of trainee and another to play the patient. You may want to use the Ineffective Coaching Skit: MVA Procedure script, or a combination of script with individual

embellishments by the learners based on the roles. If you do not use a script, be sure that the role players assist you in including important examples of ineffective coaching.

❍ If you use the script, give it to the role players to look over and describe to each the role they are to play: the trainee should play the role as slightly nervous and un-confident; the patient should be afraid and nervous; and as the coach you will be too directive and a little condescending. The "patient" should kneel above the pelvic model to act as the voice of the patient. (See *Using this Manual* for more information on Including the Patient Role in Clinical Role Plays.)

● Conduct the skit.

● Lead a discussion. After the skit, refer to your pre-prepared responses for Ineffective Clinical Coaching to ensure that learners identify the most ineffective practices demonstrated during the skit.

❍ Ask learners to use helpful methods of giving and receiving feedback as described in their Giving and Receiving Feedback handout.

❍ Ask learners to state what practices they found ineffective and write them on the flipchart: Ineffective Coaching.

❍ Ask the people who played the patient and trainee (in that order) to share what they felt was ineffective.

❍ Point out any unmentioned areas of the performance that displayed ineffective coaching.

❍ In closing, summarize ineffective coaching practices from the flipchart list making sure you mention that ineffective coaching is: controlling, directive, doesn't adequately involve the trainee, uses one-way communication, is often stressful for the trainee and neglects to include positive feedback.

● Introduce the effective coaching demonstration (30 minutes).

❍ Ask learners to brainstorm effective coaching techniques, reminding them to think about what they said during the Cross the World icebreaker and what has been talked about thus far. Write their responses on flipchart: Effective Coaching.

This skit is a demonstration of effective clinical coaching. Once again, I am playing the coach, and two participants will each play the clinical trainee and patient. While you watch the skit, please evaluate the demonstration using the Effective Clinical Coaching: Competency Checklist. When the skit is done, we will discuss our findings.

❍ Ask one learner to play the role of trainee and one the patient. Use the Effective Coaching Skit: MVA Procedure script, or a combination of script with individual embellishments by the learners based on

the roles. If you do not use a script, be sure that the role players assist you in including important examples of effective coaching.

● Conduct skit.

● Lead a discussion. After the skit, refer to your pre-prepared responses for Effective Clinical Coaching to ensure that learners identify all of the techniques used in the skit.

❍ Remind learners to use effective methods of giving and receiving feedback as described in their handout: Giving and Receiving Feedback.

❍ Ask learners to share select responses from their effective clinical coaching checklists and add them to the flipchart: Effective Coaching, if they are not there already.

❍ Ask the people who played the patient and trainee (in that order) to share what they felt was most effective.

❍ In closing, summarize effective coaching techniques from the flipchart list making sure you mention that effective coaching: focuses on practical steps, is collegial and respectful, uses two-way communication, attempts to minimize trainee stress, and provides positive feedback and concrete suggestions for improvements.

5. Facilitate coaching practice with a clinical example. (See Option One in *Optional Activities for Practicing Clinical Coaching* for a non-clinical coaching practice example and Option Two for ideas on actual clinical practice.)

1 hour 30 minutes

> **Note to trainers:** Less experienced learners may require coaching practice using everyday skills before advancing to simulated clinical coaching practice (see Option One in *Optional Activities for Practicing Clinical Coaching*). Learners with more clinical and coaching experience may begin their coaching practice using a simulated clinical procedure. Some learners may be ready to practice coaching skills in an actual clinical setting (see Option Two in *Optional Activities for Practicing Clinical Coaching*).

● Separate learners into small groups. If possible, each small group should have a facilitator who is an experienced trainer to ensure that learners are accurately modeling coaching. If this is not possible, then the trainer can rotate around to each group to monitor learners' practice.

● Explain that learners will now practice clinical coaching skills.

❍ Depending on their clinical skill level, learners may practice using a simple clinical procedure, such as giving a patient an injection, or a more involved one, such as performing a
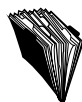
uterine evacuation with MVA, conducting postabortion family-planning counseling, or another skill.

❍ Learners should be knowledgeable and comfortable with the procedure to the point where they can evaluate it without concentrating on each step, to allow them to focus on their coaching skills. It is important that all learners do not get consumed in the specific technique of the actual procedure being coached, but stay focused on the skills of coaching instead.

Note to trainers: When selecting a clinical procedure for small-group practice, make sure it is one with which all of the participants are familiar and at ease so they can focus on their coaching skills. It would be difficult for participants to effectively learn new coaching skills and clinical skills at the same time. Health-care providers should be grouped according to similar clinical training experience. Trainers will need to prepare in advance a clinical skills assessment checklist for the chosen clinical procedure. A sample clinical assessment checklist for an MVA procedure is included here and a postabortion family-planning counseling checklist is included in the reference manual.

❍ Participants take turns playing the coach, trainee, patient and observers until everyone has had a chance to practice coaching.

❍ Coaches need to coach on both clinical and interpersonal skills and can use the appropriate clinical skills assessment checklist to provide feedback to the trainee as part of the coaching process. The person playing the trainee can deliberately make mistakes to allow the person playing the coach to practice making corrections and giving constructive feedback. Observers will use the Effective Clinical Coaching: Competency Checklist to assess the coach's skills.

As you practice coaching, remember to coach trainees by using a combination of active listening, questioning, positive feedback and problem-solving techniques to help trainees develop confidence and competence in new clinical skills.

❍ At the conclusion of each coaching practice, the person playing the coach will self-evaluate, and then the people playing the trainee, patient and observers (in that order) will refer to their effective clinical coaching checklists to give feedback on the coaching skills and make suggestions for improvement.

❍ Facilitators should allow learners to give all of their feedback first, but remain on hand to provide additional feedback missed by learners.

❍ Optional: If resources are available, trainers can videotape learners while they coach and then play the video back to allow them to see and hear themselves before they self-assess on their coaching techniques.

20 minutes

● Process the coaching practice activity by leading a discussion about the clinical coaching practice:

❍ *What happened in your small group? What did you see or hear?*

❍ *How did it feel to be the coach? The trainee? The patient? The observers? If optional actual clinical practice activity was conducted, what differences did learners note between coaching in simulated and actual clinical practice settings?*

❍ *What are some of the key lessons from this activity that we should bring to our work as clinical trainers and coaches?*

❍ *What might you do differently as a clinical trainer/coach as a result of this session? How might you act differently when you train and coach health-care workers in the future?*

❍ A small-group simulated coaching practice such as this one can also be used to assess coaching competency. See Option Three in *Optional Activities for Practicing Clinical Coaching* for more information.

6. Facilitate commitment circle sharing.

10 minutes

● Ask learners to stand in a circle. Ask each learner to share one new technique they plan to improve on and are committed to using to be an effective coach to health-care workers. Go around the circle until everyone has shared.

7. Summarize session and link to next activity.

5 minutes

What remaining questions and comments on effective clinical training and coaching do you have?

Note to trainers: This is the final session of Part II. Transition to closing and evaluation activities

Optional Activities for Practicing Clinical Coaching

Option One: Coaching practice non-clinical example

If learners are relatively inexperienced with clinical coaching skills, it will be useful for them to practice coaching skills using an everyday example first, then advance to clinical coaching practice using a simulated clinical procedure. If time permits, the trainer may want to demonstrate the non-clinical coaching example first for the large group, then break into small groups for trainees to practice coaching. If possible, each small group should have a facilitator who is an experienced trainer to ensure that learners are accurately modeling coaching. If not, then the trainer can rotate around to each group to monitor their practice.

1. Facilitate coaching practice with a non-clinical example.
   - Ask each small group to choose a simple everyday skill they will use to practice their coaching skills, for example: tying a man's tie, donning a woman's traditional outfit, cooking a particular meal, dancing a special dance, etc.
     - ❍ The small group can develop a skills competency checklist for the chosen skill. The person playing the coach can then use this checklist as a tool to assess the trainee and provide feedback as part of the coaching process. For example, for tying a man's tie, the checklist could include: 1. Place tie around neck, with thicker end on the right-hand side. 2. Cross thicker end over thinner end. 3. Bring thicker end around and under thinner end. The trainee would be coached on performing each of these standardized steps in the checklist.
   - Ask learners to take turns practicing their coaching skills.
     - ❍ The practice should consist of one person playing the coach, one playing the trainee and the rest acting as observers who will evaluate the coach's skill using the Effective Clinical Coaching: Competency Checklist.
     - ❍ Once each practice session is concluded, the coach should self-evaluate, then the trainee and the observers (in that order) should give the coach feedback based on his or her performance according to the Effective Clinical Coaching: Competency Checklist.
     - ❍ Each learner should have an opportunity to play the role of coach, trainee and observer.

Option Two: Actual clinical practice

1. Once participants have had adequate opportunity to practice and become competent coaching in a simulated setting, schedule time for them to practice in an actual clinical setting with health-care workers and patients.
   - Ensure in advance that the learners know the clinical practice standards in that setting to coach others on the appropriate protocols. Use clinical assessment checklists that reflect those protocols.
   - If you are using additional preceptors from that clinical setting, ensure that they will model the desired coaching techniques.
   - Observe them during the actual coaching practice to ensure consistent coaching feedback.

> **Note to trainers:** Clients' rights are paramount. Clients must always give prior voluntary, informed consent before being included in a clinical practice session. Trainers should receive special permission if more than one trainee will be in the room. Trainers should limit the number of trainees present.

Option Three: Coaching competency assessment

Ideally, the achievement of true coaching competency should be based on assessing a learner in actual clinical practice with real trainees and patients. If conducting the optional actual clinical coaching practice, competency assessment can take place then. If that is not possible, this exercise could be used instead.

1. Facilitate the coaching competency assessment.
    - Repeat the entire small-group simulated coaching practice with a different clinical procedure than the one practiced earlier (see step five in instructions section) to assess each learner's coaching skills, using the Effective Clinical Coaching: Competency Checklist.

        ○ Those who fail to successfully reach competency should only be given a certificate of completion, if appropriate, and should be offered additional opportunities for practice and competency assessment.

        ○ Those who reach coaching competency can be certified. Those learners who are certified will still need ongoing practice and supportive supervision to maintain competency.

Ineffective Coaching Skit: MVA Procedure
Instructions and Script

Roles: Coach, trainee and patient

Materials: Table, pelvic model, speculum, tenaculum, gauze, antiseptic bowl, clear bowl for viewing tissue, forceps, MVA aspirator, cannula, gloves, syringe with hypodermic needle, needle extender (optional).

Room Set-Up: Coach and trainee are outside the door to the procedure room. Patient is inside the room on the procedure table. Room and door can be imaginary. Patient is represented by a pelvic model on the table with a person sitting at the end of the table to provide the patient's facial expressions and words. (See *Using this manual* for more information about patient role.)

Introduction to Participants: We're going to do a skit about clinical coaching. In this skit, we have the coach, clinical trainee and patient, represented by a person and pelvic model. For learning purposes, we are going to demonstrate ineffective coaching techniques. While we do the skit, please write down what you think is ineffective on your Effective Clinical Coaching Competency Checklist. When we're done with the skit, we're going to discuss it.

Script:

Coach: Hello. I see that you'll begin performing the MVA procedure on patients today. Do you know how to do an MVA?

Trainee: I've practiced twice on a pelvic model, and I believe my skills are good. I'm ready to practice on patients now.

Coach: Oh yeah, I remember seeing you practice on the pelvic model. You need some work on your antiseptic preparation techniques as I recall. And you also didn't seem to know when the procedure was finished. You can practice these today with patients.

Trainee: Oh. Well, maybe my skills aren't as good as I thought they were.

Coach: Your goal for today should be to practice until you are able to perform the procedure correctly from start to finish at least three times. We should have at least that many patients this morning. They're probably fine with us practicing on them. I'm going to let you do all of the talking. *[Knocks on procedure room door.]*

[Coach and trainee enter room with patient on table ready for procedure.]

Trainee: Hello. We're here to do your procedure. *[Patient looks nervously from trainee to coach. Coach looks at patient and nods without introducing her/himself.]* Please lie back and move your pelvis to the edge of the table. I'm going to insert the speculum.

Coach: Wait! You didn't even do the bimanual yet!

Trainee: Oh. Excuse me. *[Conducts a bimanual exam.]* OK, we're going to need a big cannula for her because she's further along than the report says. *[Trainer shakes head silently. Patient looks worried.]* Now I'm going to put the speculum in. *[Puts speculum in. Wipes inside vagina. Patient jumps because she didn't know what the trainee was going to do next.]*

Coach: You have to wipe the cervix first and then work your way out towards the vaginal opening. Here, let me show you. *[To patient]* I'm going to wipe inside you now. *[Takes instrument with antiseptic gauze from trainee and wipes the cervix and vagina.]* Now you try it.

Patient: *[Looks even more nervous.]* What are you going to do?

Trainee: *[Doesn't look up at her.]* Don't you worry about what I'm going to do, you'll be fine. *[Changes antiseptic gauze and wipes cervix and inside vagina.]* How was that?

Coach: That was okay. Proceed.

Trainee: I administer the paracervical block next, correct? *[Coach nods yes. Trainee stabilizes cervix with tenaculum and administers paracervical block.]*

[Patient winces, and then cries out when the needle goes in.]

Coach: *[To patient]* I'm sorry he did that. *[To trainee]* You should try to be gentler.

Trainee: *[To coach]* I really don't think I hurt her that much. *[To patient]* I'm going to begin the procedure now. [Inserts the cannula through the cervix and attaches the charged aspirator. Patient begins to softly moan. Both coach and trainee are focused on the procedure and seem to have forgotten the patient. Trainee opens the valve to initiate suction and rotates the aspirator back and forth gently inside the uterus. Suddenly the coach notices the patient crying.]

Coach: *[To trainee]* Did you make sure she got some medication beforehand for her pain?

Trainee: No, but it won't take long now.

[Patient cries louder when she realizes that she should have gotten pain medication.]

Coach: Can't you feel the gritty sensation in the uterus and see the pinkish foam in the cannula? There is no more tissue passing through. You're done. *[Trainee locks and disconnects the aspirator and removes cannula and then the tenaculum and the speculum.]* *[To patient]* You can move back on the table now.

[Patient looks relieved but still in pain. She holds her head and cries.]

Trainee: Now I check to make sure that I got it all, right? *[Patient looks worried again.]*

Coach: Correct. You did okay, but I'm going to give you more feedback when we step out of the room. *[To patient]* You were a brave woman. A nurse will be in shortly to escort you to the recovery area.

[Coach and trainee leave the room.]

END SKIT.

Effective Coaching Skit: MVA Procedure
Instructions and Script

Roles: Coach, trainee and patient

Materials: Table, pelvic model, speculum, tenaculum, gauze, antiseptic bowl, clear bowl for viewing tissue, forceps, MVA aspirator, cannula, gloves, syringe with hypodermic needle, needle extender (optional).

Room Set-Up: Coach and trainee are outside the door to the procedure room. Patient is inside the room on the procedure table. Room and door can be imaginary. Patient is represented by a pelvic model on the table with a person sitting at the end of the table to provide the patient's facial expressions and words. (See *Using this manual* for more information about patient role.)

Introduction to Participants: This next skit is a demonstration of effective clinical coaching. While you watch the skit, please evaluate it using the Effective Clinical Coaching: Competency Checklist and noting what we wrote earlier as good techniques on the flipchart. When the skit is done, we will discuss it.

Script:

Coach: *[to trainee]* Hello, I'm Dr. [name]. Welcome to your clinical practice session. Today you're scheduled to practice performing the MVA procedure with patients. I observed your practice on a pelvic model yesterday and feel confident that you have gained competence with simulated practice and are ready to practice with patients. Do you feel ready to start?

Trainee: Yes, I'm ready. I'll appreciate your feedback on how I can improve my skills.

Coach: Thank you. And please feel free to let me know what I can do to help you gain the skills you need. What skills do you feel you want to focus on today?

Trainee: I would like to make sure that I communicate sensitively with patients and handle them gently. I also want to make sure that I can tell when the procedure is complete.

Coach: Those sound like good learning goals. You may also want to focus on your antiseptic preparation techniques and on checking the products of conception after the procedure, because those are difficult to master during simulated model practice.

Trainee: So can we assume that the patients are willing for me to practice with them?

Coach: We have asked permission of all of our patients regarding their participation in the training today, and you will only practice with those patients who have given their prior consent. I'm going to let you do most of the talking to get practice speaking with the patient which is one of your goals. If I hear you saying something that is not appropriate or is incorrect, I'd like to make a subtle correction. Is that okay with you?

Trainee: Yes, that is fine. But what if I do something that isn't quite right, what will we do?

Coach: I suggest that if I see you doing something incorrect, I will speak very softly to you over your shoulder about how to proceed or change what you've done. I don't want the patient to hear us

so we can avoid alarming her. I can also give you this hand signal [makes a motion with hand], and then you can pause a moment to think about the steps of the procedure or what you could improve upon. Again, we can speak very quietly or I can use my hands to describe to you what you can do differently. Is that okay with you? [Trainee nods yes.] Are you ready now? [Trainee nods again. Coach knocks on procedure room door.]

[Coach and trainee enter room with patient on procedure table ready for procedure.]

Trainee: Hello, Ms. [name]. My name is Dr. [name] and this is my preceptor, Dr. [name]. [Trainee and coach smile and shake patient's hand, if appropriate.] We're here to do your procedure. [Patient smiles a little nervously and looks at the trainee and coach.] How are you feeling about being here today?

Patient: I feel awful that I'm in this situation and having to do this.

Trainee: I think a lot of women feel sad about having to make this kind of decision. I can see that you're a little bit nervous, but this procedure is very safe.

Coach: What can we do that would be most helpful to you?

Patient: Well, I am afraid it is going to hurt a lot.

Trainee: Have you been given something to reduce the pain? [Patient nods yes.] I can't promise that it won't hurt at all, but I will do everything I can to make this as gentle and comfortable as possible. [Patient nods again.] Please lie back and move your pelvis to the edge of the table. I've warmed the speculum, and I'm going to insert it now. [Trainee moves to insert the speculum. Coach stops trainee silently with a hand signal.]

Coach: [Looking meaningfully at the trainee.] First we're going to do an examination.

Trainee: [Remembers what to do.] Yes, first I'm going to examine you. [Conducts a bimanual exam. Selects appropriate cannula size and shows trainer, who nods head yes in approval of selection.] Now I'm going to put in the speculum. It may be little uncomfortable and you might feel a slight pinch when I put it into place. [Puts speculum in.] Now I'm going to wipe inside you with an antiseptic. [Begins wiping inside the vagina.]

Coach: [Whispering quietly over trainee's shoulder] Wipe the cervix in a circular motion moving from the inside to the outside working your way out towards the vaginal opening.

Trainee: [Wipes from cervix to vagina and looks at coach for approval.]

Coach: Ms. [name], how are you feeling?

Patient: It feels uncomfortable but I'm okay. It doesn't hurt.

Coach: [To trainee: smiles and nods approval then whispers.] Good, please proceed.

Trainee: [Moves to administer the paracervical block.]

Coach: *[Motions with hand to pause.]* *[To patient]* Now we're going to insert some numbing medication into your cervix. [Nods head to indicate that the trainee can continue.]

Trainee: *[To patient]* Now I'm going to insert the medication. You might feel a slight prick or stinging sensation when this goes in. Just take several deep breaths and try to relax. *[Injects at 12 o'clock and then applies tenaculum to stabilize cervix.]*

[Patient winces, and cries out when the needle goes in.]

Coach: *[To patient]* I'm sorry you're uncomfortable. Try to take long, deep breaths. *[To trainee, whispering]* That was good, but try injecting more slowly and with a lighter touch.

Trainee: *[To patient]* I'll go slower and will do my best to be gentle. Are you ready for me to continue? *[Patient nods head yes. Trainee injects paracervical block at other points.]* How was that?

Patient: That was better.

Trainee: *[Inserts the cannula through the cervix and attaches the charged aspirator. Patient begins to softly moan]* Are you in pain?

Patient: No, I'm just scared.

Trainee: That's understandable, but as I said earlier, this is a very safe procedure. Can you try to focus on calming thoughts? Close your eyes and imagine that you are in a pleasant place where you are very relaxed. *[Pause]* Are you ready for me to begin the procedure now? *[Patient nods head yes. Trainee opens the valve to initiate suction and rotates the aspirator back and forth gently inside the uterus.]* It won't take long now. *[Trainee continues suction.]* *[To patient]* Are you still taking deep breaths? *[Patient nods yes.]* Very good.

Coach: *[whispering.]* What does the uterus feel like now? Do you think you are finished?

Trainee: *[Whispering back]* I feel the signs of completion so I think I must be done. *[Looks at coach, who nods head yes. Trainee locks and disconnects the aspirator, emptying the contents into a bowl. Trainee removes the cannula and tenaculum and begins to remove the speculum but the coach motions his hand to pause.]*

Coach: *[Whispering]* Check the POC first before removing the speculum to be sure you're done. *[Both trainee and coach look at the POC and nod to each other that it is sufficient with gestational age.]*

Trainee: *[To patient]* We're done now. *[Removes the speculum and POC dish. Coach motions to cover the POC dish with a cloth. Trainee covers POC dish and moves it out of the way and then says to patient.]* You can move back on the table now.

[Patient looks relieved but still in some pain.]

Trainee: *[To patient]* How do you feel?

Patient: I have cramps but not too bad. I'm glad it is over with.

Trainee: *[To patient]* You did very well and these cramps will subside soon. The nurse will give you some more medication that will help relieve them too. *[Looks at coach for hint of what to do next.]*

Coach: *[To patient]*: Yes. Just try to relax on the table and a nurse will be in shortly to escort you to the recovery area. Do you have any questions for us?

Patient: No, I'll be okay. I know this was the right thing to do. Thanks for your help.

Coach: *[To patient, patting her arm and smiling]* You are welcome.

[Trainer and trainee leave the room.]

Coach: *[To trainee]* Well done! Now let's sit down and talk about how you think it went and if you feel you met your learning objectives for this practice session.

END SKIT.

Effective Clinical Coaching: Competency Checklist

Coach: _____ Trainee: _____ Date:_____

Coaching Skills	Yes	No
Pre-practice goal-setting		
Greets trainee		
Asks trainee to think about and comment on previous performance and practice sessions		
Asks trainee what steps or tasks s/he would like to work on for this practice session		
Reviews these steps or tasks in the standardized clinical checklist		
Works with trainee to set specific learning goals for practice session		
During the practice session		
Observes trainee performing the clinical skill		
Provides positive support (verbal and/or non-verbal as appropriate) to trainee during the session		
Provides specific suggestions for improvement as trainee practices the skill		
Refers to clinical checklist and writes notes about performance during the observation (this may not be appropriate during some actual clinical setting practice)		
Shows sensitivity to trainee when providing feedback during session		
Makes corrective action only when the comfort or safety of patient is in question		
Post-practice feedback		
Asks trainee to reflect upon practice session and share feelings about it		
Asks trainee to identify steps or tasks performed well		
Asks trainee to identify any steps or tasks that could be improved		
Reviews clinical checklist scores with trainee, giving positive reinforcement to steps performed properly		
Provides specific suggestions regarding areas that can be improved		
Problem-solves with trainee about difficult steps or issues		
Patient Rights in actual clinical practice		
Ensures trainee competency with simulated practice before practicing with patient		
Ensures patient consent before conducting practice		
Models respectful interaction and communication with patients		

Adapted from Sullivan, et al., 1998.

M V A   P r o c e d u r e   C l i n i c a l   A s s e s s m e n t   C h e c k l i s t

Instructions: The trainer/coach should use this form to evaluate the trainee's ability to perform one part of the MVA procedure.

I. Clinical Skill
Mark an "x" in the box that corresponds to the trainee's level of skill, according to the following scale:

Yes = Shows adequate skill with this step

No = Needs more training or supervised practice (see recommendations)

N/O = Skill not observed (see recommendations)

Yes	No	N/O	
❏	❏	❏	Establishes rapport with the woman, discussing the procedure and giving her psychological support
❏	❏	❏	Performs a pelvic exam and evaluates the uterus and cervix
❏	❏	❏	Selects proper cannula based on uterine size and cervical dilation needed
❏	❏	❏	Gently inserts speculum
❏	❏	❏	Swabs cervix with antiseptic solution
❏	❏	❏	Administers paracervical block
❏	❏	❏	Inserts cannula
❏	❏	❏	Uses No-Touch Technique to avoid contaminating the cannula
❏	❏	❏	Connects cannula to aspirator and opens the valve's buttons to activate vacuum
❏	❏	❏	Holds aspirator correctly during procedure
❏	❏	❏	Moves cannula effectively to empty uterus
❏	❏	❏	Stops evacuation when signs of completion are present

This checklist was adapted for use during simulated coaching of clinical practice – pre-procedure and post-procedure steps are not included. For a complete checklist, see Jarrell, et al., 2002.

II. Recommendations

For items rated "no" or if the skill could not be observed, suggest ways for the trainee to develop the needed skill. For example: needs more practice inserting the speculum gently.

Item	Recommendations

Adapted from Jarrell, et al., 2002.

Appendix 1: Overview of Course Sessions

Sessions	Purpose	Time	Materials*
Part I			
Training Course Overview: Welcome Introductions Goals Objectives Expectations Agenda Parking Lot Trainer and Participant Roles Task groups Group Norms Feedback/Evaluations Housekeeping	The purpose of this session is to welcome training course participants and solicit their expectations; orient them to the course objectives and agenda, trainer and participant roles, and group norms; and invite them to provide ongoing evaluation of the course. The aim is to create a safe learning environment that enables trainers and learners to achieve training course objectives.	1 hour 15 minutes	**Instructions:** Training Course Overview **Slide presentation:** Training Course Overview **Flipcharts:** Expectations, Parking Lot, Trainer's Roles, Learners' Roles, Group Norms **Materials:** Participant packets including course agenda and slide presentation handouts, name tags, markers, task clock, items for dividing participants into groups, suggestion box and cards
Adult Learning Principles and Learning Cycle	The purpose of this session is to introduce the principles of adult learning and the adult learning cycle. During this session, learners will identify the unique learning needs and preferences of adult learners and articulate strategies for course design and delivery that maximize learners' acquisition and retention of new knowledge and skills.	1 hour 10 minutes	**Instructions:** Adult Learning Principles and Learning Cycle **Slide presentation:** Adult Learning Principles and Learning Cycle **Handouts:** Slide presentation handouts, Adult Learning Principles, Adult Learning Principles Trainer's Version **Materials:** Chime or gentle noisemaker, items for dividing participants into groups

Appendix 1: Overview of Course Sessions

Sessions	Purpose	Time	Materials*
Adult Learning Styles	The purpose of this session is to introduce adults' different learning styles and discuss the importance of accommodating the full variety of learning styles in training courses. Ensuring that training courses are responsive to the various learning styles of all participants will enhance the effectiveness of the course and participants' learning experience.	1 hour 40 minutes	**Instructions:** Adult Learning Styles **Slide presentation:** Adult Learning Styles **Handout:** Slide presentation handouts **Worksheet:** Reproductive Health Training Activities for Different Learning Styles **Materials:** Long piece of masking tape, string or rope, items for dividing participants into groups, optional: prizes for winning group members
Characteristics of Effective Trainers	The purpose of this session is to provide an overview of the characteristics of effective trainers and to allow learners the opportunity to reflect on their strengths and weaknesses as trainers and identify those areas in which they would like to improve.	50 minutes	**Instructions:** Characteristics of Effective Trainers **Handout:** Trainer's Self-Assessment Tool **Materials:** Flipchart or other large piece of blank paper, markers, tape, index cards of two different colors
Effective Communication Skills	The purpose of this session is to identify techniques for effective verbal and nonverbal communication during a training course, and to practice employing these techniques to demonstrate interest in and respect for learners' contributions and ensure that learners comprehend key information.	55 minutes	**Instructions:** Effective Communication Skills

Appendix 1: Overview of Course Sessions

Sessions	Purpose	Time	Materials*
			Handouts: Lecture on Condom Use Script for Trainer Demonstration, Communication Skills Checklist, Lecture on Condom Use Script for Small Group **Materials:** Flipchart, markers, tape, items for dividing participants into groups
Creating a Productive Learning Environment (End of first day reflection session)	The purpose of this session is to underscore the importance of creating a training environment that is emotionally safe, physically comfortable and conducive to learning. Learners will discuss concrete strategies for creating a productive learning environment.	30 minutes	**Instructions:** Creating a Productive Learning Environment **Materials:** Flipchart, markers, training toys (colored pipe cleaners, modeling clay, stress balls and other toys), Training Course Overview: Possible Group Norms
Managing Stages of Training Group Dynamics	The purpose of this session is to make learners aware of the stages of training group development that take place during a course and how the stages affect learning. Participants will also learn to identify strategies for managing training group dynamics to create a supportive learning environment.	45 minutes	**Instructions:** Managing Stages of Training Group Dynamics **Slide presentation:** Managing Stages of Training Group Dynamics **Worksheet:** Managing Stages of Training Group Dynamics
Managing Challenging Learner Behaviors	The purpose of this session is to help trainers develop strategies for managing disruptive or challenging behaviors that learners might display during a training course. During this session, learners will identify types of learner behavior that are particularly challenging to them and work in pairs to share strategies and practice managing this behavior.	40 minutes	**Instructions:** Managing Challenging Learner Behaviors **Materials:** Challenging Learner Behavior cards, bell, chime or whistle

Appendix 1: Overview of Course Sessions

Sessions	Purpose	Time	Materials*
Managing Sensitive Topics in Groups	In this session, learners identify sensitive topics that may arise during a reproductive-health training course, strategize ways to productively manage sensitive topics in groups and practice using these strategies. Learners will also examine how their personal beliefs may affect a training course and share strategies for managing these beliefs.	1 hour 10 minutes	**Instructions:** Managing Sensitive Topics in Groups **Materials:** Flipchart, markers, tape, notecards or sticky notes in two different colors, basket and "agree" and "disagree" cards
Training Methods	The purpose of this session is to introduce different training methods that facilitate participants learning and practicing new knowledge, attitudes and skills. Learners will practice using different kinds of training methods and receive structured feedback about their performance as trainers.	2 hours 30 minutes	**Instructions:** Training Methods **Handouts:** Training Methods Teach-Back Assessment Forms, Giving and Receiving Feedback **Materials:** Training Methods cards, items for dividing participants into groups, optional: prizes for winning group members, flipcharts, markers, chime, bell or whistle
Use of Breaks, Icebreakers, Energizers and Closing Activities (End of day reflection session)	This session emphasizes the importance of incorporating breaks, icebreakers, energizers and closing activities into training courses to create a comfortable and supportive learning environment, help learners to maintain energy and focus throughout a course, increase learner retention and recall, and provide closure at the end of the course.	25 minutes	**Instructions:** Use of Breaks, Icebreakers, Energizers and Closing Activities **Materials:** Flipchart, markers
Golden Rules of Training	This session introduces the golden rules, or key concepts, of training that trainers should keep foremost in their minds as they plan and conduct a training course to increase the likelihood that the course will be effective.	1 hour	**Instructions:** Golden Rules of Training **Handout:** Golden Rules of Training **Materials:** Four cards prepared with golden rules

Appendix 1: Overview of Course Sessions

Sessions	Purpose	Time	Materials*
Planning an Effective Training Course	The purpose of this session is for learners to explore the characteristics of an effective training course, the 12 steps that guide the process of planning an effective training course and the rationale and key components of each planning step. Learners will practice applying the 12 planning steps to design a training course for a specific audience and training need.	3 hours 5 minutes	**Instructions:** Planning an Effective Training Course **Worksheet:** 12 Steps for Planning a Training Course: Small Group Research **Handouts:** Completing the 12 Planning Steps, Case Studies **Materials:** Flipchart, tape, markers, 12 Planning Steps cards, prizes, chime
Training in Teams	This purpose of this session is to educate learners on how to work effectively in a training team.	20 minutes	**Instructions:** Training in Teams **Materials:** Flipchart, markers, ball
Handling Difficult Situations (End of day reflection session)	The purpose of this session is to help prepare learners to handle difficult situations by sharing strategies for how to respond to them.	35 minutes	**Instructions:** Handling Difficult Situations **Materials:** Blank paper, markers (one for each small group), Difficult Situation cards
Part II			
Individualized Clinical Training Approaches	The purpose of this session is to teach learners about effective, individualized clinical training approaches that can be used in a variety of settings and in conjunction with group-based training and clinical coaching.	1 hour	**Instructions:** Individualized Clinical Training Approaches **Worksheet:** Individualized Clinical Training Approaches

Appendix 1: Overview of Course Sessions

Sessions	Purpose	Time	Materials*
Clinical Coaching Skills	The purpose of this session is to teach learners effective clinical coaching approaches and skills. Learners will observe, practice and then be evaluated on the effective coaching skills they would use to train health-care workers in both simulated and actual clinical settings.	4 hours 10 minutes	**Instructions:** Clinical Coaching Skills **Handouts:** Effective Clinical Coaching: Competency Checklist, Giving and Receiving Feedback, clinical assessment checklist **Materials:** Flipchart, markers, Ineffective Clinical Coaching skit instructions and script, Effective Clinical Coaching skit instructions and script, materials for clinical coaching demonstration and small-group practice (for example, for MVA: pelvic model, speculum, tenaculum, gauze, antiseptic bowl, clear bowl for viewing tissue, forceps, MVA aspirator, cannula, gloves, syringe with hypodermic needle, needle extender (optional), optional: ball, video recorders and equipment)
Appendix: Overview of course sessions Sample course agenda Course evaluation form Participant evaluation form and answer key Certificate of completion Additional icebreakers, energizers, daily evaluation and training course evaluations			

* *Effective Training in Reproductive Health: Course Design and Delivery - Reference Manual* is needed throughout the course.

Appendix 2: Sample Course Agenda
T r a i n i n g   o f   T r a i n e r s

Dates _____ Location _____

Course Goal

❑ Develop participants' competence to plan, implement and evaluate effective reproductive-health training courses

Course Objectives:

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

1. Describe and apply the fundamental principles of adult learning and training

2. Articulate the characteristics of effective trainers

3. Demonstrate effective communication and facilitation skills

4. Create a productive learning environment

5. Describe and utilize appropriate training methods

6. Design training courses to meet objectives

7. Describe different approaches to clinical training

8. Demonstrate effective clinical coaching skills

Participants

[List names and other pertinent information]

_____

_____

_____

_____

_____

Facilitators

[List names and other pertinent information]

_____

_____

_____

_____

Dates

Arrival Date: _____

Training Start and End Dates: _____

Training Duration: [in hours] _____

Departure Date: _____

Venue

[Insert name of venue, address, telephone number, etc.]

_____

_____

_____

_____

Contact for More Information

[Insert name, address, telephone number, email address, etc.]

_____

_____

_____

_____

_____

Sample Course Agenda

Day _____ Dates _____

Time	Facilitator	Agenda Items
9:00-10:15	[List facilitators' names]	**Training Course Overview** • Welcome and Opening Remarks • Facilitator and Participant Introductions • Workshop Goals and Objectives • Participants' Expectations of the Course • Agenda • Parking Lot • Facilitator and Participant Roles and Responsibilities • Explain and assign four task groups: icebreaker, energizer, evaluation, logistics • Group Norms • Feedback/Evaluations • Housekeeping
10:15-10:25		• Icebreaker: Hopes and hesitations for themselves as reproductive-health trainers • Debrief Icebreaker
10:25-10:35		BREAK
10:35-11:45		• Adult Learning Principles and Learning Cycle
11:45-12:45		LUNCH
12:45-2:25		• Adult Learning Styles
2:25-2:45		BREAK
2:45-3:40		• Characteristics of Effective Trainers
3:40-4:35		• Effective Communication Skills
4:35-5:05		• Creating a Productive Learning Environment: Structured reflection
When needed during afternoon		• Energizer: My Mama Says • Debrief Energizer
5:05-5:15		• Wrap-Up • Review and discuss Parking Lot • Daily Evaluation: pluses and wishes
5:15-5:30		• Four Task Groups Prepare Homework
5:30-6:00		• Facilitators Debrief

Sample Course Agenda

Day _____ Dates _____

Time	Facilitator	Agenda Items
9:00-9:15	[List facilitators' names]	• Review Preview: review yesterday's daily evaluation results and facilitators' responses; preview today's agenda
9:15-9:30	Icebreaker Group	• Icebreaker • Debrief Icebreaker
9:30-10:15		• Managing Stages of Training Group Dynamics
10:15-10:30		BREAK
10:30-11:10		• Managing Challenging Learner Behaviors
11:10-12:20		• Managing Sensitive Topics in Groups
12:20-1:20		LUNCH
1:20-3:00		• Training Methods
3:00-3:15		BREAK
3:15-4:05		• Training Methods, continued
4:05-4:30		• Use of Breaks, Icebreakers, Energizers and Closing Activities: Structured reflection
When needed during afternoon	Energizer Group	• Energizer • Debrief Energizer
4:30-4:45	Evaluation Group	• Wrap-Up • Review and discuss Parking Lot • Daily Evaluation • Debrief Evaluation
4:45-5:00		• Rotate Task Clock arms • Four Task Groups Prepare Homework
5:00-5:30		• Facilitators Debrief

Sample Course Agenda

Day _____   Dates _____

Time	Facilitator	Agenda Items
9:00-9:15	[List facilitators' names]	• Review Preview: review yesterday's daily evaluation results and facilitators' responses; preview today's agenda
9:15-9:30	Icebreaker Group	• Icebreaker • Debrief Icebreaker
9:30-10:30		• Golden Rules of Training
10:30-10:45		BREAK
10:45-12:00		• Planning an Effective Training Course
12:00-1:00		LUNCH
1:00-2:50		• Planning an Effective Training Course, continued
2:50-3:10		• Training in Teams
3:10-3:25		BREAK
3:25-4:00		• Handling Difficult Situations: Structured reflection
When needed during afternoon	Energizer Group	• Energizer • Debrief Energizer
4:00-4:15	Evaluation Group	• Wrap-Up • Review and discuss Parking Lot • Daily Evaluation • Debrief Evaluation
4:15-4:30		• Rotate Task Clock arms • Four Task Groups Prepare Homework
4:30-5:00		• Facilitators Debrief

S a m p l e   C o u r s e   A g e n d a

Day _____ Dates _____

Time	Facilitator	Agenda Items
9:00-9:15	[List facilitators' names]	• Review Preview: review yesterday's daily evaluation results and facilitators' responses; preview today's agenda
9:15-9:30	Icebreaker Group	• Icebreaker • Debrief Icebreaker
9:30-10:30		• Individualized Clinical Training Approaches
10:30-10:45		BREAK
10:45-12:15		• Clinical Coaching Skills
12:15-1:15		LUNCH
1:15-3:15		• Clinical Coaching Skills, continued
3:15-3:30		BREAK
3:30-4:10		• Clinical Coaching Skills, continued
When needed during afternoon	Energizer Group	• Energizer • Debrief Energizer
4:10-5:00	Evaluation Group	• Wrap-Up • Review and discuss participants' expectations of the course • Final Course Evaluation • Participant Evaluation • Closing Activity and Ceremony: Present certificates of completion

Appendix 3: Course Evaluation

Dates _____   Location _____

Objectives:

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

❑ Describe and apply the fundamental principles of adult learning and training

❑ Articulate the characteristics of effective trainers

❑ Demonstrate effective communication and facilitation skills

❑ Create a productive learning environment

❑ Describe and utilize appropriate training methods

❑ Design training courses to meet objectives

❑ Describe different approaches to clinical training

❑ Demonstrate effective clinical coaching skills

Please rate the training course on each item below using the following scale. Please use the comments section to provide more information about the rating and suggestions for improvement.

4 = strongly agree   3 = agree   2 = disagree   1 = strongly disagree

	Rating
The training course fulfilled its objectives (see above). *Comments:*	_____
The training course was well organized. *Comments:*	_____

4 = strongly agree 3 = agree 2 = disagree 1 = strongly disagree	Rating
The trainers were responsive to participants' needs. *Comments:*	_____
The trainers modeled effective training methods. *Comments:*	_____
The training sessions were effective. *Comments:*	_____
The training materials (handouts, visual aids, worksheets, etc.) were effective. *Comments:*	_____
There were adequate opportunities for discussion. *Comments:*	_____
The physical facilities were conducive to learning and sharing. *Comments:*	_____

4 = strongly agree 3 = agree 2 = disagree 1 = strongly disagree	Rating
The travel, hotel and other logistical arrangements were satisfactory. *Comments:*	_____
Because of this training, I have a better understanding of adult learning principles and learning styles. *Comments:*	_____
Because of this training, I will adhere to adult learning principles and learning styles when I design and implement training courses. *Comments:*	_____

Additional questions:

Name at least three things will you do differently as a result of this training to better plan, implement and evaluate training courses?

1.

2.

3.

What parts of the training were most useful to your work as a trainer?

What parts of the training were least useful to your work as a trainer?

What would you have liked the training agenda to include or cover in more detail?

What would you have liked to remove from the training agenda or cover in less detail?

General comments and suggestions:

Thank you!

Appendix 4: Participant Evaluation

1. Which statement about learning is TRUE?
   a. Learners' motivation to change does not affect their acquisition of new knowledge
   b. Learning by memorization promotes better understanding of information
   c. Learning is a process in which new information is related to what is already known
   d. Relating new information to what learners already know causes confusion for learners

2. Trainers can enhance learner retention and recall by which of the following:
   a. Using activities that focus on one sense (smell, taste, sight, etc.) at a time
   b. Using blue or green markers to write concepts on posters or charts
   c. Limiting the amount of breaks during a training session
   d. Using humor as a tool to help reduce boredom or tension

3. Which of the following is NOT an adult learning principle?
   a. Adults learn best when they accept responsibility for their own learning
   b. Adults learn best when learning is applied immediately
   c. Adults learn best when learning occurs in large groups
   d. Adults learn best when the learning experience is active not passive

4. Which is the CORRECT sequence of events in the adult learning cycle?
   a. Learners experience new information; generalize the experience; process the information; and apply the experience to actual situations
   b. Learners experience new information; process the information; generalize the experience; and apply the experience to actual situations
   c. Learners generalize the experience; experience new information; process the information; and apply the experience to actual situations
   d. Learners experience new information; process the information; apply the experience to actual situations; and generalize the experience

5. When deciding how to deal with challenging learner behaviors, the best course of action is the one that:
   a. Benefits the most people in the group
   b. Takes the least amount of time
   c. Benefits the person creating the disruption
   d. Avoids creating conflict at all costs

6. Write one possible solution for the following disruptive situations:

   a. During your training session, the electricity goes out

   b. Your co-trainer does not show up on the morning of the training course

   c. Only three learners out of ten are present at the time the training is supposed to start

7. Draw a line connecting the challenging learner type to the way to work effectively with this learner:

| Nay Sayers:
Won't accept yours or other learners' point of view | | Acknowledge the amount of questions they have and tell them you will work with them individually later on. |

| Arguers:
Combative personalities | | Acknowledge that they are a wealth of information. |

| Ramblers:
Use inappropriate or farfetched examples from their own experiences | | Offer support, allow other learners to comfort them and make sure they feel free to leave the room if they need to. |

| Talkers:
May be exceptionally well informed and anxious to show what they know | | When they stop for a breath, thank them, refocus their attention by restating relevant points and move on. |

| Inaccurate commentators:
Come up with comments that are obviously incorrect | | Slow them down with a difficult question or task, for example, make them the group leader. |

| Questioners:
May be testing you by putting you on the spot | | Say, "thank you for the opportunity to clear up that point." |

| Emotionals:
May be needing lots of support | | Honestly try to find merit in one of their points, and then move on. |

8. Effective trainers:
   a. Are able to sway other peoples' opinions to be in line with their own
   b. Are inclusive and encourage all learners to share their experiences
   c. Are always serious and understand that fun takes time away from learning
   d. Are firm and do not make exceptions to their set of rules

9. The three main roles of an effective trainer are to:
   a. Facilitate, discipline, mentor
   b. Discipline, mentor, lead
   c. Mentor, guide, discipline
   d. Lead, mentor, facilitate

10. Which of the following is an open-ended question?
    a. Are you feeling all right today?
    b. Is there anything else I can do for you?
    c. What do you think brings up these feelings for you?
    d. How old is your partner?

11. Trainers can model effective nonverbal communication skills by:
    a. Maintaining appropriate eye contact
    b. Offering helpful advice
    c. Crossing their arms to show detachment
    d. Sitting behind a desk to indicate their authority

12. Feedback is most constructive when it:
    a. Is delivered a long time after the learner performs a skill
    b. Is delivered using "you" statements ("You really need to…")
    c. Is descriptive, but does not pass judgment on the learner's intentions or skills
    d. Does not target specific errors, but rather is made up of general comments

13. Which of the following is a CORRECT "Golden Rule" description?
    a. "Less is more" means less time spent taking breaks leaves more time for learning
    b. "It's not about you" means that trainers should meet their own needs last
    c. "Appreciate diversity" means that trainers should vary the materials they use during training courses
    d. "Group supported to solo" means gradually moving from group activities to more independent
       work by learners

14. Which of the following is NOT a golden rule of training?
    a. Complex to simple
    b. Safe to risk-taking
    c. Practice makes perfect
    d. Ask don't tell

15. Warm-up exercises that allow participants to get to know each other and their trainer at the
    beginning of a training session are called:
    a. Energizers
    b. Icebreakers
    c. Closing exercises
    d. Introductions

16. After how many minutes does a learner's ability to retain and recall information significantly
    decline?
    a. 10 minutes
    b. 30 minutes
    c. 50 minutes
    d. 75 minutes

17. When choosing an icebreaker or energizer, trainers should consider:
    a. The desired effect of the icebreaker/energizer
    b. Any possible negative outcomes that could occur as a result
    c. The characteristics of the learners

d. a and c
e. a, b and c

18. The typical order of the stages of group dynamics are:
    a. Cohesion, conflict, apprehension, creation, closure
    b. Apprehension, cohesion, creation, achievement, closure
    c. Cohesion, creation, apprehension, achievement, closure
    d. Apprehension, achievement, conflict, cohesion, closure

19. Give an example of an action or attitude trainers can take during stage five (closure), when learners may be experiencing a sense of loss over the course ending.

20. Which of the following learners is at the "apprehension" stage?
    a. Khosi is excited about the training, but wonders why so many of the participants are doctors
    b. Bill is feeling a sense of belonging in the group and is becoming more satisfied with his ability to perform the skills he is learning
    c. Ivan is realizing that everyone at the training has a unique and valuable perspective to share
    d. Marta is feeling happy about everything she has learned in the training, but she is apprehensive about how she can apply her new skills in her workplace

21. Which of the following is NOT a good way to help learners know what to expect during a training course?
    a. Review the goals and objectives of the training
    b. Talk about the trainer's role during the training
    c. Tell learners the set of rules they are expected to follow
    d. Explain to learners where they can get a drink of water or find a restroom

22. Which of the following is TRUE about group norms?
    a. Group norms are not usually necessary unless learners are exhibiting disruptive behavior
    b. It is preferable for the trainer to create the group norms and present them to learners for their approval
    c. Group norms should be written down and posted where learners can see them
    d. The trainer should ask learners to report the behavior of other learners who break the group norms

23. Most likely, a "parking lot" would include:
    a. Questions about the session the trainer is currently facilitating
    b. Concerns that can briefly be addressed later in the course
    c. Comments made by learners that were inappropriate
    d. Suggestions about how the trainer could better facilitate the course

24. Which is NOT a reason for trainers to introduce a sensitive topic?
    a. To challenge learners to question their beliefs
    b. To help learners gain an appreciation for different opinions
    c. To give learners the opportunity to practice handling sensitive topics
    d. To convince learners to adopt the trainer's opinions

25. Which is NOT a strategy for handling sensitive topics?
   a. If there is not a clear learning opportunity, then the trainer can acknowledge the importance of the topic, and then make a transition to a less sensitive subject
   b. If there is a clear learning opportunity, the trainer can guide the participants into a structured activity where they are able to process their feelings
   c. If learners are engaging in a discussion about a sensitive topic, the trainer should exercise strong group-facilitation skills to include all opinions
   d. If there is a clear learning opportunity, the trainer can open up the topic and then step back and let the participants argue freely

26. A training method to spontaneously generate a creative list of ideas, thoughts, problems or solutions around a particular theme or topic without regard to application of these ideas is called:
   a. Brainstorming
   b. Role play
   c. Practicum
   d. Coaching

27. A field trip to another location to observe an operational facility or other venue outside the classroom that is relevant to the content of a training session would best meet the learning needs of which types of learners?
   a. Innovators and experiencers
   b. Reflective observers and experimenters
   c. Analyzers and innovators
   d. Reflective observers and analyzers

28. A trainers' willingness to use a variety of training methods:
   a. Shows their confusion and an inability to stay on track
   b. Requires them to cater to too many different people
   c. Is an indication of their effectiveness
   d. Is generally positive, but can be a weakness if it takes extra planning time

29. Which of the following is a FALSE statement about the 12 steps for planning an effective training course?
   a. Trainers may not always complete all of the steps, but there are certain steps that must be completed
   b. Although each trainer uses his or her own process to plan courses, all trainers should complete certain steps before others
   c. Completing each of the 12 steps for planning a training course helps ensure that trainers succeed in designing courses that contribute to positive, lasting change
   d. The primary consideration when designing a training course is whether or not to use more than one training method.

30. Which of the following is NOT a good strategy for selecting a trainer?
   a. Select a trainer who does not have experience working with your target audience so that he or she will bring a fresh perspective to the course
   b. Select a trainer who will support and promote the mission of the agency planning the training course
   c. Use guest trainers to provide a range of expertise and experience
   d. Assess trainers' skills by observing them facilitating a training course

P a r t i c i p a n t   E v a l u a t i o n
A n s w e r   K e y

1. c

2. d

3. c

4. b

5. a

6. For possible answers, see refence manual, page 33.

7.

Left	Right
Nay Sayers: Won't accept yours or other learners' point of view	Acknowledge the amount of questions they have and tell them you will work with them individually later on.
Arguers: Combative personalities	Acknowledge that they are a wealth of information.
Ramblers: Use inappropriate or farfetched examples from their own experiences	Offer support, allow other learners to comfort them and make sure they feel free to leave the room if they need to.
Talkers: May be exceptionally well informed and anxious to show what they know	When they stop for a breath, thank them, refocus their attention by restating relevant points and move on.
Inaccurate commentators: Come up with comments that are obviously incorrect	Slow them down with a difficult question or task, for example, make them the group leader.
Questioners: May be testing you by putting you on the spot	Say, "thank you for the opportunity to clear up that point."
Emotionals: May be needing lots of support	Honestly try to find merit in one of their points, and then move on.

8. b

9. d

10. c

11. a

12. c

13. d

14. a

15. b

16. c

17. e

18. b

19. Possible answers: design a special activity to create a sense of closure or acknowledge participants' feelings about the course ending.

20. a

21. c

22. c

23. b

24. d

25. d

26. a

27. a

28. c

29. d

30. a

Ipas

Certificate of Completion

Awarded to

_____
NAME

completed _____ hours of training

On _____
DATE

_____
Trainer/Project Manager

_____
Trainer/Project Manager

Effective Training in Reproductive Health:
Course Design and Delivery

Appendix 6: Ice Breakers
Ice Breaker: My Place in History

Time: 1-2 minutes for each learner, up to 35 minutes total time

Purpose:

This icebreaker gets learners moving and allows them to get acquainted with other learners. It helps learners see where everyone fits into the larger picture.

Group Size: Up to 35

Materials:

• Long piece (3-4 yards, depending on how many years included in the history) of brightly colored paper with different years written along the top

• Half sheets of colored paper

Trainer's notes	Instructions
	1. Explain that we want to know more about where everyone in the group fits into the larger picture.
	2. Ask everyone to think about when they first joined the organization or started working in this field, as appropriate.
	3. Ask each person to take a half sheet of paper and draw a symbol or picture or write a word that captures something about how they got involved in this work or organization. Give an example: "I might draw a picture of a nurse's hat because I was a nurse working in a women's health clinic and someone asked me to work on this project." Emphasize that this is not about great art work. People can use stick figures or whatever else they used to draw pictures when they were young. Ask each learner to sign their first name and first letter of their last name on the paper.
	4. Give learners five minutes to do this individual work. Then bring attention back to the large group.
	5. Ask that people who joined the organization or started this type of work in the first five years to come up to the timeline. Ask people to tell their name, what their role is in the organization/field, and a brief sentence or two about what got them involved. Ask that they post their paper on the timeline under the appropriate year. Repeat this process for each five year time period. Encourage people to be brief.
	6. Summarize the activity by observing how much collective experience appears to be in the room. Some people have been with the organization/field for a long time and thus carry much of the institutional memory. Others are newer and bring a fresh perspective and energy. All organizations/fields need both the experience of those who have been around a while and those with a new perspective.
	7. Link to the next activity.

Ice Breaker: Birth Order

Time: 10-15 minutes

Purpose:

This icebreaker provides an opportunity for learners to get to know one another better and build a sense of team identity.

Group Size: 20-25

Materials:

• Signs labeled: Only Child, Oldest Child, Youngest Child, Middle Child

Trainer's notes	Instructions
	1. Introduce this activity as an opportunity to get to know each other better.
	2. Post each of the signs in a different corner of the room.
	3. Ask participants to go to the appropriate corner of the room based on their own birth order position.
	4. When everyone is assembled, ask each group to discuss what special characteristics their birth order has and how it is reflected in their choice of job. Assign a recorder based on some criteria, such as the person who traveled the farthest to the training.
	5. After 5-10 minutes, bring attention back to the larger group. Have each group report back to the larger group.
	6. Link to next activity.

Ice Breaker: Found Objects

Time: 10-15 minutes

Purpose:

This icebreaker provides an opportunity for learners to get to know one another better and to get oriented to the content of the training. Furthermore, it challenges participants to think creatively and look at the workshop topic in a new way.

> **Note to trainers:** This icebreaker should be used with a group that has already developed rapport and feels comfortable with each other.

Group Size: 10-15

Materials:

- A variety of objects displayed on the table (there should be 1½ times as many objects as there are people). Some examples of objects include, but certainly are not limited to: feather, ruler, paper money, rock, rubber ball, flowers, paper clip, pair of glasses, bell, pen, a small toy, pipe cleaner.

Trainer's notes

Instructions

1. Introduce activity as an opportunity to get to know one another better and get oriented to the topic of the training.

2. Explain that you would like for each person to choose an object from the table that speaks to them in some way about the training topic. Acknowledge that it might not seem obvious at first how these objects might relate to the training so they should think creatively.

3. After everyone has picked an object, ask them to take it back to their seats with them.

4. Explain that each person will say his or her name and explain how a particular object speaks to him or her about the training topic. Inform them that they can speak from personal experience or anything else.

5. Ask for a volunteer to go first. Go around the room until everyone has talked about their object.

6. Discuss activity using the following questions as a guide:
   - What did you feel about doing this exercise?
   - What was difficult or easy?
   - What associations most delighted you? Surprised you?
   - What aspects of the training topic surfaced during the activity?
   - How might you look at the topic differently as a result of this activity?

7. Link to next activity.

Ice Breaker: Concentric Circle Introductions

Time: 15-20 minutes

Purpose:

This icebreaker provides an opportunity for learners to get to know one another better. Furthermore, it is designed so that each learner has the opportunity to have his or her voice heard in the room. Participating in this way helps create an atmosphere in which contributions are validated and participation is encouraged.

Group Size: Any

Materials:

- Bell, whistle or other noisemaker
- Flipchart
- Marker

Trainer's notes	Instructions
	1. Introduce activity as an opportunity to get to know one another better.
	2. Ask the group to brainstorm questions they would like to ask to get to know each other better. Ask for questions that would gather personal information (What do you like to do in your free time?) as well as professional information related to the training (What do you hope to get out of the training? What three things do you like best about _____ [training topic]). Write down questions on flipchart.
	3. Have learners form two concentric circles in which each person in the inner circle faces one person in the outer circle to form pairs. (A trainer should join the circle if there is an odd number of participants.)
	4. Have the pairs exchange names and discuss some of the questions for three minutes.
	5. After three minutes, ring the bell and ask people in the outer circle to move a few steps to the right to form new pairs. Repeat this until learners have had the chance to meet a few different group members.
	6. Ask the group to return to their seats. Go around and have each person share one interesting thing they learned about another group member.
	7. Link to next activity.

Ice Breaker: What's in a Name?

Time: 20-45 minutes (depending on the size of the group)

Purpose:

This icebreaker provides an opportunity for learners to get to know one another better based on a deeper exploration of their names. Furthermore, it is designed so that each learner has the opportunity to have his or her voice heard in the room. Participating in this way helps create an atmosphere in which contributions are validated and participation is encouraged.

Group Size: Any

Materials:

- Flipchart prepared with questions about names
- Markers

Trainer's notes	Instructions
	1. Introduce activity as an opportunity to get to know one another better.
	2. Explain that we are going to go around the room and have each person share the following things about his or her name (refer to flipchart): • Your whole name. • As much as you know about how you got your name, such as its history, origin and family stories about it. • How you feel about any part of your name or how you feel you have been shaped (aided or hindered) by your name. • Any nicknames you've had that you are willing to share and any feelings about these nicknames.
	3. Encourage the group to only listen and refrain from commenting during this sharing.
	4. Close activity by reminding participants that there is often much more to a name than meets the eye. Explain that we need to be mindful of creating spaces where we can ask such questions about each other to get to a level deeper than where customary introductions take us. Getting to know each other is the essential first step to healthy group relations and a safe learning environment.
	5. Link to next activity.

Ice Breaker: Picture This

Time: 20-45 minutes (depending on the size of the group)

Purpose:

With this icebreaker, each learner will get to know a little bit about other learners based on the cards they choose.

Group Size: Up to 20

Materials:

- Picture postcards or photos (there should be more postcards or photos than participants)

Trainer's notes	Instructions
	1. Display the photos or postcards on a table for all to see.
	2. Ask each learner to pick a card or photo that speaks to them in some way.
	3. After everyone has picked a card, ask people to introduce themselves by name and to hold up their photo/postcard and tell why it spoke to them. (If the room is large and/ or the visibility is compromised, then ask people to briefly describe the picture first.)
	4. Thank everyone for sharing.
	5. Close activity by asking the group what patterns or themes they observed.
	6. Link to next activity.

Appendix 7: Energizers
Energizer: Going Blank
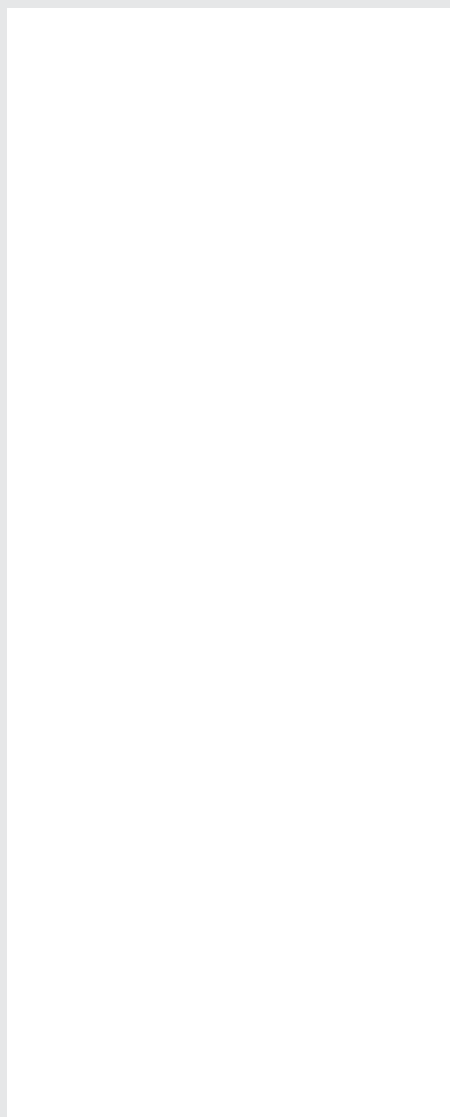
Time: 5-10 minutes

Purpose:

This energizer provides an opportunity for learners to get up and move around.

Group Size: Any

Materials:

- None

Trainer's notes	Instructions
	1. Introduce activity as an opportunity to get up and move around.
	2. Ask the group to brainstorm three categories of anything at all – foods, fruits, cities, political leaders, flowers, birds, etc.
	3. Ask for a volunteer to start out being "it."
	4. Ask the group to form a circle with the person who is "it" standing in the center. Explain that whoever is "it" points to anyone in the circle and names one of the three categories. The person picked must name something within that category (for example, a type of fruit) within three seconds. If the person fails to respond in time or responds incorrectly, that person becomes "it." The person who is "it" must move quickly around the circle to try and catch people off guard.

Energizer: I Write My Name

Time: 5 minutes

Purpose:

The purpose of this energizer activity is getting people up, moving around and having some fun.

Group Size: Any

Materials:

- None

Trainer's notes	Instructions
	1. Ask learners to stand up. Then put an imaginary pen in the hand they normally write with. Instruct them to write their first name in the air with the imaginary pen.
	2. Then ask them to put the imaginary pen in their other hand and write their first name in the air.
	3. Repeat, asking them to put the imaginary pen in their mouth and write their first name in the air.
	4. Finally, ask the learners to put the imaginary pen in their belly button (navel) and write their first name in the air. This usually surfaces lots of laughter and everyone is energized!
	Note to trainers: There may be some groups where this exercise might be culturally inappropriate or offensive. People in wheelchairs or others with physical limitations may not be good candidates for this exercise.

Energizer: Three Things in Three Minutes

Time: 5-10 minutes

Purpose:

The purpose of this energizer activity is for learners to practice listening and agreement skills.

Group Size: Two players at a time

Materials:

- None

<table>
<tr><th>Trainer's notes</th><th>Instructions</th></tr>
<tr><td></td><td>

1. Ask for two volunteers for this activity and have them come to the front of the room. Have the volunteers decide who will leave the room and who will stay to receive instructions.

2. Ask volunteer one to leave the room.

3. Ask the group to decide on three things for volunteer one to do upon returning (for example, sneeze, roar like a lion, take a nap). Volunteer two will have three minutes to get volunteer one to do all three things. However, volunteer two cannot directly say what to do. He or she has to hint, imply and suggest. For example, to get them to sneeze, volunteer two might say, "You look like you have a cold." Volunteer two will have to continue with hints until volunteer one successfully performs the intended action. When volunteer one gets it right, the group should applaud. Volunteer two will then quickly move on to the next action.

4. After explaining the activity and having the group pick the three actions, call volunteer one back into the room and explain that the group has come up with three things they want him or her to act out. Volunteer two will allude to them, but not say them directly. Suggest that the best way to accomplish this task is to act rather than to think.

5. Allow three minutes for the exercise.

</td></tr>
</table>

Energizer: What Are You Doing?
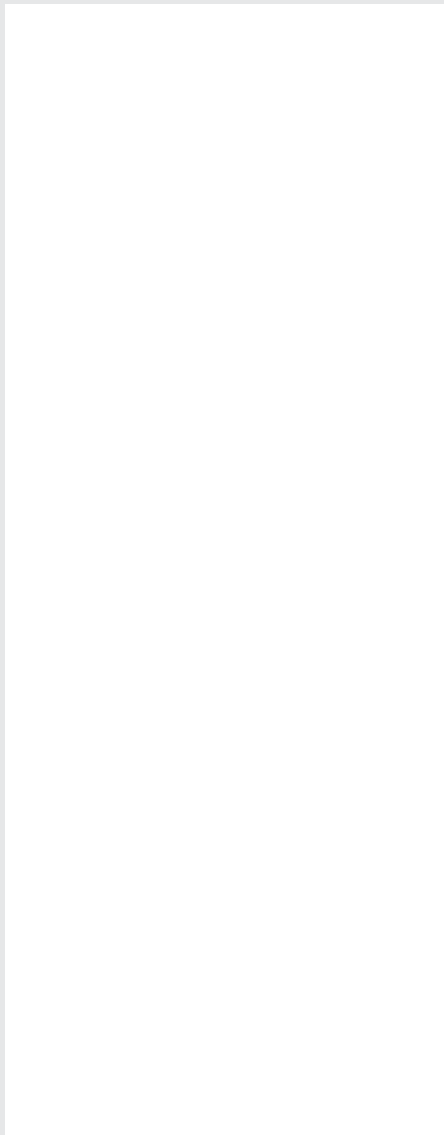
Time: 10 minutes

Purpose:

This energizer activity calls on learners to focus on what is said rather than on what is actually happening. The purpose is for learners to separate action from discussion, or allow mind and body to operate separately.

Group Size: Two players at a time

Materials:

• None

Trainer's notes	Instructions
	1. Ask the group to form a circle.
	2. Explain that one person will start out by mimicking a physical action, such as writing a letter, while the person to his or her right asks, "What are you doing?" The first person responds by naming some other activity, such as, "I'm washing the car." The person to his or her right then acts out washing the car. The person to this person's right will then ask, "What are you doing?" This pattern continues around the circle.
	3. Ask the group if they have any questions about the activity. Allow activity to continue until everyone has had a chance to participate.
	4. Link to next activity.

Energizer: YES!!!

Time: 5 minutes

Purpose:

This energizer activity calls on learners to lose feelings of self-consciousness, follow through on agreements, and accept others' ideas and offers unconditionally. It also builds enthusiasm within a group.

Group Size: Any

Materials:

- None

Trainer's notes

Instructions

1. Tell the group that the game will begin with everyone wandering aimlessly around the room.

2. Explain that you will shout a physical activity in a loud, enthusiastic voice. For example, "Let's go skating!" After you announce the activity, everyone in the room should immediately, enthusiastically and loudly shout "Yes!" At that time, everyone will begin acting out the activity.

3. Explain that the activity will continue while others in the group take turns offering other activities by calling them out. Each time, the group responds by shouting "Yes!" and acting out the new activity. Any group member can make a suggestion at any time.

4. Link to next activity.

Energizer: My Mama Says

Time: 5-10 minutes

Purpose:

This energizer gets the group up and moving around and deals with the importance of following directions and knowing whose example to follow.

Group Size: Up to 45

Materials:

• None

Trainer's notes	Instructions
	1. Ask participants to stand up.
	2. Explain that you will be the leader.
	3. Tell participants that the goal of this exercise is to follow the directions of the leader. Every time the leader says, "My mama says to do something," they should do it.
	4. Say that what makes this exercise challenging is that they shouldn't do anything unless it is preceded by the phrase, "My mama says…"
	5. Give an example. "If I said, 'My mama says pat your head,' you would pat your head. Go ahead now and pat your head until I give the next direction. Now, 'My mama says clap your hands.' '' Wait for learners to clap their hands. Then say, "Stick out your tongue."
	6. Point out that because mama didn't say to stick out your tongue, no one should be doing it. Participants who stuck out their tongues would be out of the game and have to sit down.
	7. Answer any questions and then start the exercise.
	8. The last person standing is the winner. Encourage the group to clap for the winner.
	9. Link to next activity.
	Note to trainers: This process can be repeated several times with the winner from the previous round becoming the leader.

Appendix 8: Daily Evaluation: Fist of Five

Time: 5-10 minutes

Purpose:

This activity provides a mechanism for participants to give feedback regarding the training/learning experience. It can be used repeatedly throughout a training to evaluate specific activities or at the end of the training session to evaluate the overall training.

Group Size: Any

Materials:

- None

Trainer's notes	Instructions
	1. Explain that you want the group to indicate how well they liked the activity or training by showing the number of fingers between one and five that best reflects how they feel. Five fingers mean they liked it a lot and one means they did not like it at all.
	2. Ask participants to make a fist and hold it high up in the air. Explain that on the count of three, everyone should show the number of fingers that best expresses how much they liked the activity/training.
	3. Scan the room to get a sense of how the group felt about the activity. Ask individuals for feedback about why they rated the activity the way they did.
	4. Thank the participants for their input and assure them that the trainers will carefully consider their feedback.
	5. Link to next activity.

Appendix 9: Training Course Evaluation Form I

Please complete the following sentences with the best word or phrase to describe your reactions to the course.

In the course today…

I felt like I most wanted to participate when _____

_____

The key concept I took away was _____

_____

The facilitators were _____

_____

The atmosphere can be described as _____

_____

The sequence/flow of activities was _____

_____

If I were leading the course, I would have done _____ differently.

I would have done _____

_____

How supported do you feel in trying to use these tools? (1 = very supported,
2 = supported, 3 = somewhat supported, 4 = unsupported, 5 = very unsupported) _____

I would rate this course on a scale of 1 to 5 (1 = great, 5 = not so great) _____

Thank you for your input!

Training Course Evaluation Form II

1. What, for you, was the most vivid scene of the course?

2. When did you find yourself most involved and interested?

3. What about this course was most significant for you?

4. What about this course was most challenging for you?

5. How would you describe this course to a friend or coworker?

6. What is one small, very specific thing you will do differently as a result of this course?

What are your ideas for future courses (topics, ways to approach issues, etc.):

Ajello, Clayton, Kobchitt Limpaphayom, Lynne Gaffikin, Pisake Lumbiganon and John McGrath. 1994. *The effectiveness of model-based training in accelerating IUD skill acquisition. A study of midwives in Thailand.* Baltimore, MD, JHPIEGO.

American Red Cross. 1997. *Basic HIV/AIDS program: fundamentals guide for training instructors.* Falls Church, VA, American Red Cross.

Baird, Traci, Debbie Billings and Bechesani Demuyakor. 2000. Community education efforts enhance postabortion care program in Ghana. *American Journal of Public Health*, 90(4) 631-632.

Baird, Traci L., M. Virginia Chambers and Charlotte E. Hord. 1998. *Implementing postabortion care: Technical resources for PAC: Volume 1.* Chapel Hill, NC, Ipas.

Ben Salem, B. and K. J. Beattie. 1996. *Facilitative supervision: A vital link in quality reproductive health service delivery. AVSC Working Paper #10.* New York, NY, EngenderHealth. Available online at www.engenderhealth.org/pubs/workpap/wp10/wp_10.html, last accessed 23 July 2001.

Benson, Janie and Víctor Huapaya. 2002. *Sustainability of postabortion care in Peru. Final report to the Frontiers Project.* Chapel Hill, NC, Ipas.

Billings, Debbie, Traci Baird, V. Ankara, Joe Taylor and K. Ababa. 1999. *Training midwives to improve postabortion care in Ghana: Major findings and recommendations from an operations research project.* Chapel Hill, NC, Ipas.

Bradley, Janet, Pamela Fenney Lynam, Joseph C. Dwyer and Grace E. Wambwa. 1998. *Whole-site training: A new approach to the organization of training. AVSC Working Paper #11.* New York, NY, EngenderHealth. Available online www.engenderhealth.org/pubs/workpap/wp11/wp_11.html, last accessed 23 July 2001.

CARE Perú and Peruvian Ministry of Health. 2001. *Guide for Physicians on Emergency Obstetric Care.* Atlanta, GA, CARE.

The Center for Development and Population Activities. 1995. *Training trainers for development.* Washington, DC, CEDPA.

Center for Substance Abuse Prevention (CSAP). 1994. *Facilitation skills development process training module.* Rockville, MD, CSAP, Substance Abuse and Mental Health Services Administration, Department of Health and Human Resources.

Cram, David. 1988. How to design the ideal training course. In Gordon, Jack, R. Zemke and P. Jones, eds. *Designing and delivering effective training courses and measuring the results.* Minneapolis, MN, Lakewood Books.

de Bruyn, Maria and Nadine France. 2001. *Gender or sex, who cares? Skills-building resource pack on gender and reproductive health for adolescents and youth workers.* Chapel Hill, NC, Ipas.

Doak, Cecilia C., Leanard G. Doak, and Jane H. Root. 1985. *Teaching patients with low literacy skills.* Philadelphia, PA, J.B. Lippincott Company.

Eitington, Julius E. 1996. *The winning trainer. Winning ways to involve people in learning, Third edition.* Houston, TX, Gulf Publishing Company.

Family Health International. 2002. *Provider checklists for reproductive health services - Reference guide.* Research Triangle Park, NC, Family Health International.

Farrell, Betty, Douglas Huber and Ellen Israel, eds. 2000. *Module 9: Condoms and Spermicides. Comprehensive reproductive health and family planning training curriculum.* Watertown, MA, Pathfinder International.

Fonn, Sharon, Mpefe Ketlhapile and Sanjani Varkey. 2001. *Health workers for choice. Working to improve quality of abortion services.* Braamfontein, Johannesburg, South Africa Institute for Medical Research.

Fort, Alfredo, Jim McCaffery, Marc Luoma, Constance Newman, Fred Rosenweig and Sharon Rudy. 2002. *Intrah performance improvement source document.* Chapel Hill, NC, Intrah. Available online at http://www.intrah.org/sst/, last accessed 22 Jan 2003.

Freire, Paulo. 1983. *Pedagogy of the oppressed.* 20th Edition. New York, NY, The Continuum Publishing Corporation.

B i b l i o g r a p h y

Heaney, Tom. 1995. *Issues in Freirean pedagogy.* http://nlu.nl.edu/ace/Resources/Documents/FreireIssues.html (last accessed 23 Jan 2003).

Hord, Charlotte E. 2001. *Making safe abortion accessible: A practical guide for advocates.* Chapel Hill, NC, Ipas.

Hord, Charlotte E. and Makhosazana Xaba. 2002. *Abortion law reform in South Africa: Report of a study tour, May 2001.* Johannesburg, South Africa, Ipas.

Hope, Anne and Sally Timmel. 2001. *Training for transformation: A handbook for community workers.* Book 2. London, ITDG Publishing.

Hyman, Alyson and Phan Bich Thuy. 2002. *Training of trainers to conduct effective training courses.* Unpublished paper presented at the Vietnam Training of Trainers (TOT) to conduct effective training courses, Hanoi, Vietnam.

Intrah/PRIME II Project and JHPIEGO. 2002. *Transfer of learning: A guide for strengthening the performance of health care workers.* Chapel Hill, NC, Intrah.

Ipas. 2003. *Effective training in reproductive health: Course design and delivery. Reference manual.* Chapel Hill, NC, Ipas. Unpublished.

Jarrell, Martha, José David Ortiz Mariscal and Judith Winkler, eds. 2002. *Training manual for postabortion care: Technical resources for PAC: Volume 2.* Chapel Hill, NC, Ipas.

JHPIEGO. 1997a. *Framework for reproductive health training.* http://www.reproline.jhu.edu/english/6read/6training/process/3FS6FRAE.htm (last accessed 9 Oct 2001).

JHPIEGO. 1997b. JHPIEGO *Technical report FCA-28.* Baltimore, MD, JHPIEGO.

JHPIEGO. 2000. *Advanced training skills for reproductive health professionals.* Baltimore, MD, JHPIEGO.

JHPIEGO. 2001. Planning for a training course: Selecting a clinical site for a clinical skills course. *JHPIEGO Trainer News.* Baltimore, MD, JHPIEGO. http://www.reproline.jhu.edu/english/6read/6issues/6jtn/v4/tn12ctsplan3.htm (last accessed 21 Feb 2003).

Johnson, R. and D. Lewison. 1996. *Issues in training for essential maternal health care.* Baltimore, MD, JHPIEGO.

Kirkpatrick, D. 1998. *Evaluating training programs.* San Francisco, CA, Berrett-Koehler Publishers.

Knowles, James C. 1988. *The modern practice of adult education: From pedagogy to andragogy.* Englewood Cliffs, NJ, Cambridge Book Company

Long, P. and N. Kiplinger. 1999. *Making it happen: Using distance learning to improve reproductive health provider performance.* Chapel Hill, NC, Intrah. Available online at www.intrah.org/PDF/DL.pdf, last accessed 30 September 2001.

Magnum, Stephen L. 1988. On-the-job vs. classroom training: Some deciding factors. In Gordon, Jack, R. Zemke and P. Jones, eds. *Designing and delivering effective training courses and measuring the results.* Minneapolis, MN, Lakewood Books.

Marais, Thea. 1996. *Abortion values clarification training manual.* Melrose, South Africa, Planned Parenthood Association of South Africa.

McInerney, Teresa, Traci L. Baird, Alyson G. Hyman, Amanda B. Huber and Merrill Wolf, ed. 2001. *A guide to providing abortion care.* Chapel Hill, NC, Ipas.

MotherCare. 2000. Improving provider performance: An exploration of the literature. *MotherCare Matters*, 9(2).

National Cancer Institute. 2001. *Trainer's guide for cancer education.* Rockville, MD, National Institute of Health, National Cancer Institute.

Otsea, Karen, Janie Benson, Diana Measham, Margaret V. Thorley and Rosalinda Lidh. 1999. *Technical resources for PAC: Monitoring postabortion care: Volume 3.* Chapel Hill, NC, Ipas.

Pfeiffer, J.W. and A.C. Ballew, eds. 1991. *Theories and models in applied behavioral science, Vol. 2.* San Diego, CA, Pfeiffer and Company.

Robinson, Russell D. 1994. *An introduction for helping adults learn and change.* West Bend, WI, Omnibook Company.

Rogo, Khama, Solomon Orero and Monica Ogutto. 1998. Preventing unsafe abortion in Western Kenya: An innovative approach through private physicians. *Reproductive Health Matters*, 6(11).

Russell, Susan. 1997. Create effective job aids. *Info-line Issue #9711.* Alexandria, VA, ASTD.

Sanders, Ethan. 1999. Learning technologies. *Info-line Issue #9902*. Alexandria, VA, ASTD.

Senderowitz, Judith, Cathy Solter and Gwyn Hainsworth. 2000. Module 16: Reproductive health services for adolescents. *Comprehensive health and family planning training curriculum.* Watertown, MA, Pathfinder International.

Sharpe, Cat, ed. 1989. Course design and development. *Info-line Issue #8905.* Alexandria, VA, ASTD.

Smith, Mark K. 1997. *Paulo Freire*. http://www.infed.org/thinkers/et-freir.htm (last accessed 23 Jan 2003).

Solter, Cathy. 1997. Module 14: Training of trainers. *Comprehensive reproductive health and family planning training curriculum.* Watertown, MA, Pathfinder International.

Spitzer, Dean R. 1988. Five keys to successful training. In Gordon, Jack, R. Zemke and P. Jones, eds. *Designing and delivering effective training courses and measuring the results.* Minneapolis, MN, Lakewood Books.

Sullivan, Rick, Ron Magarick, Gary Bergthold, Ann Blouse and Noel McIntosh. 1995. *Clinical training skills: A problem-solving reference manual.* Baltimore, MD, JHPIEGO.

Sullivan, Rick and Lynne Gaffikin. 1997. *Instructional design skills for reproductive health professionals.* Baltimore, MD, JHPIEGO.

Sullivan, Rick, Ann Blouse, Noel McIntosh, Lois Schaefer, Elaine Lowry, Gary Bergthold and Ron Magarick. 1998. *Clinical training skills for reproductive health professionals*, Second edition. Baltimore, MD, JHPIEGO.

Swift, Robin, ed. 1997. *The HeART of training: A manual of approaches to teaching about HIV/AIDS.* A joint project of Cooperative Agreement Training Working Group, Special Projects of National Significance Program, HIV/AIDS Bureau, Health Resources and Services Administration. Washington, DC, LTG Associates.

Wallerstein, Nina. 1992. Powerlessness, empowerment and health: Implications for health promotion programs. *American Journal of Health Promotion*, 6(3):197-205.

World Health Organization. 1987. *The community health worker: Working guide, guidelines for training and guidelines for adaptation.* Geneva, WHO.

Zemke, Ron and John Gunkler. 1988. 28 Techniques for transforming training into performance. In Gordon, Jack, R. Zemke and P. Jones, eds. *Designing and delivering effective training courses and measuring the results.* Minneapolis, MN, Lakewood Books.

Health. Access. Rights.

EFFTRAIN-E12