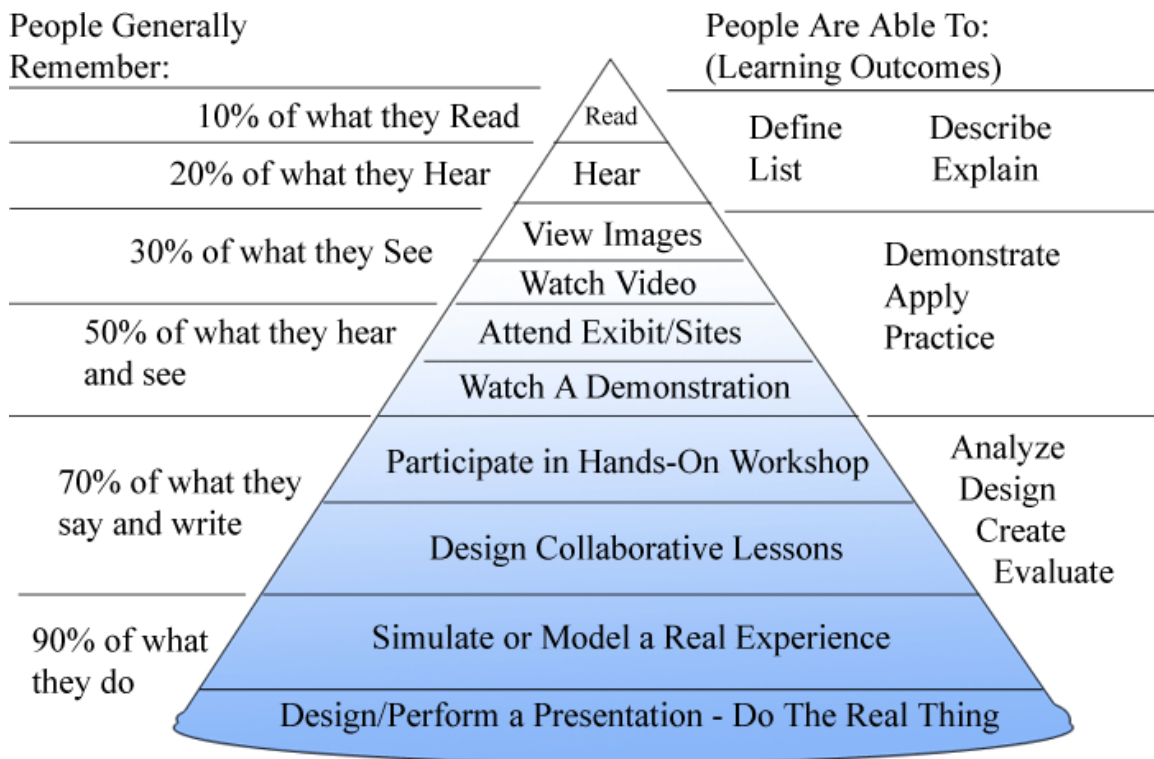


<b>Learning recall related to type of presentation</b>		
Type of presentation	Ability to recall	
	after 3 hours	after 3 days
Verbal (one-way) lecture	25%	10-20%
Written (reading)	72%	10%
Visual and verbal (illustrated lecture)	80%	65%
Participatory (role-plays, case studies, practice)	90%	70%

(Adapted from Sullivan et al., 1998)

Information provided by: Dr. Randell



## Dale's Cone of Experience

Adapted from Wiman and Meirhenry,  
Education Media, 1960 on Edgar Dale

## Principles of Adult Learning

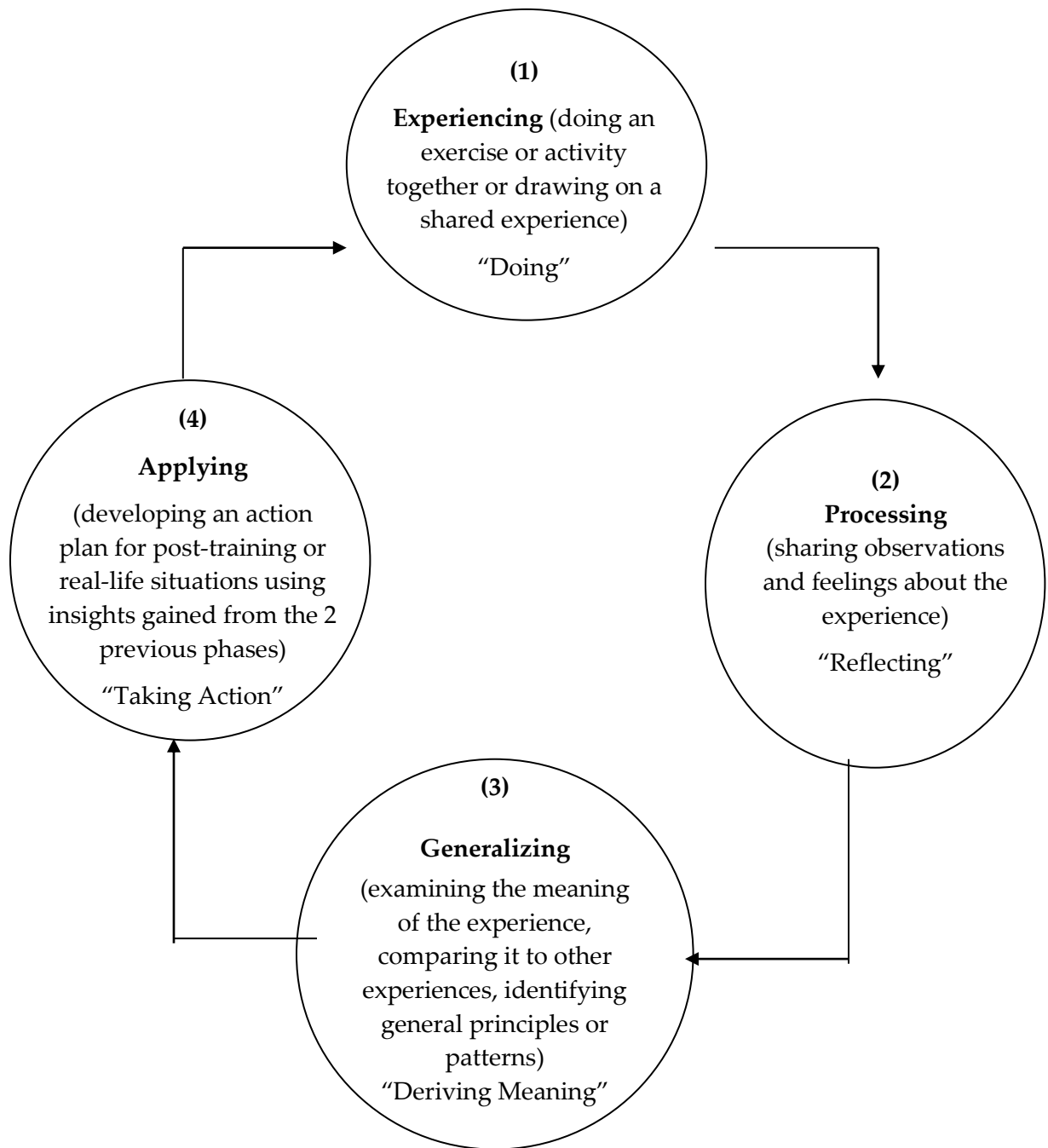
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Learners learn best when...	The role of the trainer is to...	Training strategies include...
1. They feel valued and respected for the experiences and perspectives they bring to the training situation	Elicit learners' experiences and perspectives.	
2. The learning experience is active and not passive	Actively engage learners in their learning experience.	
3. The learning experience actually fills their immediate needs	Identify learners' needs and tie training concepts into these identified needs.	
4. They accept responsibility for their own learning	Make sure that training content and skills are directly relevant to learners' experiences so that they will want to learn.	
5. Their learning is self-directed and meaningful to them	Involve learners in deciding on the content and skills that will be covered.	
6. Their learning experience addresses ideas, feelings and actions	Use multiple training methods that address knowledge, attitudes and skills.	
7. New material is related to what learners already know	Use training methods that enable learners to integrate the new material.	

Learners learn best when...	The role of the trainer is to...	Training strategies include...
8. The learning environment is conducive to learning	Take measures to assure that the physical and social environment (training space) is safe, comfortable and enjoyable.	
9. Learning is reinforced	Use training methods that allow learners to practice new skills and insure prompt, reinforcing feedback.	
10. Learning is applied immediately	Provide opportunities for learners to apply new information & skills they have learned.	
11. Learning occurs in small groups	Use 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 others.	

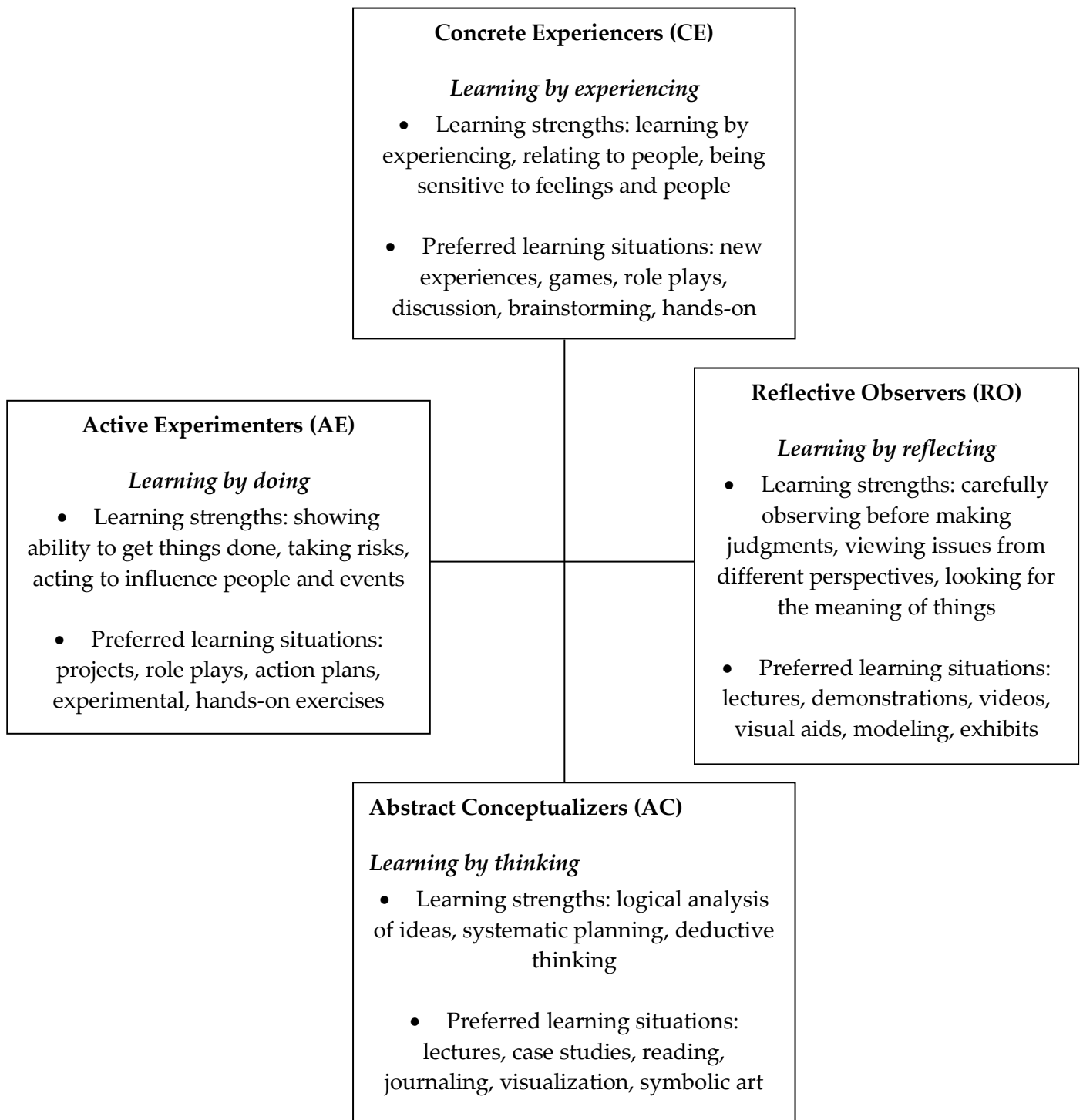
## Adult Learning Cycle

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## Learning Styles

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### Training Method #1: Presentation/lecture/panel discussions

A presentation or lecture is an activity conducted by the trainer to convey information, theories or principles. They are quick and easy ways to cover content that is new or unfamiliar to participants. Presentations can range from straight lecture to some involvement of the participants through questions and discussion. Presentations depend on the trainer for content more than any other training technique does.

Uses	Advantages	Disadvantages
<ul style="list-style-type: none"><li>• Introduces participants to a new subject</li><li>• Provides an overview or a synthesis</li><li>• Conveys facts or statistics</li><li>• Addresses a large group</li></ul>	<ul style="list-style-type: none"><li>• Covers a lot of material in a short time</li><li>• Works with large groups</li><li>• Provides context for more practical or hands-on training techniques</li><li>• Gives lecturer or presenter more control than in other training situations</li></ul>	<ul style="list-style-type: none"><li>• Emphasizes one-way communication</li><li>• Is not experiential in approach</li><li>• Requires that participants take passive role in their learning</li><li>• Requires that lecturer possess skills as an effective presenter</li><li>• Is not appropriate for changing behavior or for learning skills</li><li>• Limits participant retention unless it is followed up with a more practical technique</li></ul>

## Process:

1. (Introduce the topic: Tell the participants what you are going to tell them).

Use an opening that:

- ◆ Explains the purpose of the presentation and why it is important
- ◆ Relates to the topic, situation, participants, or speaker
- ◆ Involves and stimulates the audience
- ◆ Creates positive thinking and peaks interest
- ◆ Gets attention, for example, by using:
  - ◆ Questions
  - ◆ Unique facts
  - ◆ Illustrations
  - ◆ Quotations
  - ◆ Brief stories
  - ◆ Jokes (in good taste)
  - ◆ Gimmicks
  - ◆ Compliments
  - ◆ Subject matter of significance
- ◆ Serves as a preview to subject matter

2. Present the topic

3. Hold participant attention and interest by:

- ◆ Being enthusiastic, dramatic and/or humorous
- ◆ Using specific examples that:
  - ◆ Provide clarity, color, credibility
  - ◆ Help a general thought become a specific one
  - ◆ Make the impersonal become more personal
- ◆ Avoiding jargon
- ◆ Varying the pace
- ◆ Providing opportunities for participant involvement, by:
  - ◆ Acknowledging individuals, by name, if possible
  - ◆ Asking for participant assistance
- ◆ Using references that show material is aimed at a specific group
- ◆ Using surprises and extras
- ◆ Inviting the participants to ask questions

4. Use a closing that:

- ◆ Summarizes the entire activity and emphasizes the key take home message.
- ◆ Makes a meaningful statement.
- ◆ Relates to the topic, situation, participants, or speaker.
- ◆ Ties together the activity as an entity



**Variations:**

A lecturette is a term used for a brief (e.g., no more than 20 minutes) presentation or lecture. Often these are made more interactive by using a “call and response” format such as interspersing questions to the participants in between lecture points made by the presenter. After participants offer answers, the trainer could then validate the right answers, correct misinformation or wrong answers and then briefly summarize the take home messages. In this manner, participants are acknowledged for what they already know yet new and accurate information can be offered by the trainer. This approach emphasizes that participants already know a lot, yet there is still new information to learn from both the trainer(s) and the other participants.

Another variation on the presentation method is a panel discussion. A group of experts (e.g., family members or health professionals) present their perspectives to the participants through prepared remarks or spontaneous answers to questions posed by a moderator or facilitator. This approach can be made more interactive by allowing time for participants to ask questions or make comments. A moderator or trainer can model this interaction by asking 1 or 2 questions to “prime the pump.” Participants can also write their questions on index cards if the size of the training group makes it logistically difficult for participants to ask questions verbally.

## Training Method #2: Small Group Discussion

A small-group discussion is an activity that allows participants to share their experiences and ideas or to solve a problem. It exposes participants to a variety of perspectives and experiences as they work together to accomplish the task. Tips on determining group size are included below.

Uses	Advantages	Disadvantages
<ul style="list-style-type: none"><li>• Enables participants to present their ideas in a small group</li></ul>	<ul style="list-style-type: none"><li>• Allows participants to develop greater control over their learning</li></ul>	<ul style="list-style-type: none"><li>• Takes time to move people into groups</li></ul>
<ul style="list-style-type: none"><li>• Enhances problem-solving skills</li></ul>	<ul style="list-style-type: none"><li>• Encourages participants to be less dependent on the trainer</li></ul>	<ul style="list-style-type: none"><li>• Compromises quality control if a trained facilitator is not in each small group</li></ul>
<ul style="list-style-type: none"><li>• Helps participants learn from each other</li></ul>	<ul style="list-style-type: none"><li>• Encourages shy or less talkative participants to become involved</li></ul>	
<ul style="list-style-type: none"><li>• Gives participants a greater sense of responsibility in the learning process</li></ul>	<ul style="list-style-type: none"><li>• Allows for reinforcement and clarification of lesson through discussion</li></ul>	
<ul style="list-style-type: none"><li>• Promotes teamwork</li></ul>	<ul style="list-style-type: none"><li>• Builds group cohesion</li></ul>	
<ul style="list-style-type: none"><li>• Clarifies personal values</li></ul>	<ul style="list-style-type: none"><li>• Elicits information from participants</li></ul>	

### Process:

1. Arrange the participants in small groups using creative break up methods
2. Introduce the task that describes what should be discussed in the small group
3. Tell participants how much time they have
4. Ask each small group to designate:
  - ◆ A discussion facilitator

- ◆ A recorder
  - ◆ A person who will present the group's findings to the larger group.
5. Check to make sure that each group understands the task
  6. Give groups time to discuss.
  7. Circulate among the small groups to:
    - ◆ Clarify any questions participants may have
    - ◆ Make sure that participants are on task
    - ◆ Make sure that a few participants are not dominating the discussion
  8. Bring all of the small groups together to have a large group discussion
  9. Have the people designated by each group to present a summary of their group's findings (this could be a solution to a problem, answers to a question, or a summary of the ideas that came out during the discussion)
  10. Identify common themes that were apparent in the groups' presentations
  11. Ask the participants what they have learned from the exercise
  12. Ask them how they might use what they have learned

*Adapted from: Training Facilitators for Development, Center for Development and Population Activities, 1994*

### ***Determining group size:***

Participants learn through their own experience, especially by discussing questions posed by the trainer. Discussions can take place in a large group, in a small group, or between two participants. The following information is useful in determining the appropriate size of the group for specific activities.

- ◆ The majority of people find it difficult to speak in a big group of strangers. Also, there is usually not enough time for everyone to speak. Therefore, if everyone is to participate actively, small groups are essential.
- ◆ Most people find it difficult to listen attentively for long periods. Therefore, talks should be short, and people should be given an opportunity to discuss a topic or issue in small groups.
- ◆ We all remember much better what we have discovered and said ourselves than what others have told us. Therefore, participants should be given questions leading them to express all they have learned from their own experience first. This needs to be done in small groups.

- ◆ A resource person or facilitator can briefly sum up the points from each group and add his or her own insights later, instead of taking a long time to tell people what they know.
- ◆ Pairs are useful for:
  - ◆ Interviews
  - ◆ Intimate sharing
  - ◆ Practicing some skills (e.g., listening or feedback)
  - ◆ A quick “buzz” with one’s neighbor to stir a passion, or prompt a sleepy group into action.
- ◆ Triads are very useful for:
  - ◆ Getting everyone thinking and participating actively; one can be passive in a group of five, but that is unlikely in a group of three.
  - ◆ Testing out an idea one is hesitant to present to the full group.
- ◆ Groups of four, five, or six:
  - ◆ Will add a bit more variety for sharing ideas and insights. Four, five, or six can be a good size for a planning team, a film discussion group, or a more complex situation.

However, the bigger the group becomes, the longer the discussion and the decision-making process. (From: *Training for Transformation: A Handbook for Community Workers*)

### ***Dividing groups and assigning roles:***

When facilitating an interactive training, it sometimes is necessary to divide participants into groups and assign them roles. The following are some imaginative ways to divide participants into groups:

- ◆ Deck of cards – the four suits are the four groups.
- ◆ Colored erasers, paper clips, marbles, sticks, rubber bands, plastic Easter eggs, etc. – as many different colors as number of groups needed.
- ◆ Index cards with different stamps on them.
- ◆ Colored stickers or dots placed on or under chairs.

- ◆ Different types of candy (e.g., peppermints, butterscotch, cinnamon, fruit flavors), which participants pick out of a basket.
- ◆ M&Ms of different colors.
- ◆ If groups do not need to be exactly even, use things like types of cars participants drive, types of toothpaste they use, preferences for different types of music, etc.

*Selecting a group recorder/reporter:*

- ◆ Select any date at random. The person whose birthday is closest to that date becomes the recorder.
- ◆ Choose a person who lives closest (or farthest) from the meeting site.
- ◆ Choose the person newest (or oldest) to the organization.
- ◆ Choose the person with the most pets (including fish).
- ◆ Choose the person who exercises the most.
- ◆ Choose the person who watched the least TV in the past week.

### Training Method #3: Brainstorming

Brainstorming is an activity that generates a list of ideas, thoughts, or alternative solutions around a particular theme or topic. It is a technique for which creative thinking is more important than practical thinking. Participants spontaneously present ideas on a given topic. No idea is dismissed or criticized; anything offered is written down.

The purpose of this technique is to obtain as many ideas as possible and for participants to stimulate each other's thinking. After the list of ideas is completed, the group clarifies, categorizes, or discusses one item at a time, depending on the situation. Brainstorming can stimulate new ideas and new solutions to previously insoluble problems because of the freedom of expression that is encouraged.

Uses	Advantages	Disadvantages
<ul style="list-style-type: none"><li>• Introduce a problem or question</li></ul>	<ul style="list-style-type: none"><li>• Generates ideas and leads to discussion quickly</li></ul>	<ul style="list-style-type: none"><li>• Can be difficult to get participants to follow the rules of not diminishing or criticizing the ideas generated during the actual brainstorming activity</li></ul>
<ul style="list-style-type: none"><li>• Form the basis of discussion</li></ul>	<ul style="list-style-type: none"><li>• Allows everyone's ideas to be expressed and validated without judgment</li></ul>	<ul style="list-style-type: none"><li>• Affords opportunity for participants to get off track and develop a list too broad to guide discussion</li></ul>
<ul style="list-style-type: none"><li>• Is often used in conjunction with group discussion</li></ul>	<ul style="list-style-type: none"><li>• Generates energy to move forward with problem-solving</li><li>• Stimulates thought and creativity</li></ul>	<ul style="list-style-type: none"><li>• Opens up possibility that participants may feel badly if their idea meets with criticism</li><li>• Requires that participants have some background related to the topic</li></ul>

**Process:**

1. Establish the rules for brainstorming, including the following:
  - ◆ All ideas will be accepted for the list
  - ◆ At no time should an idea be discussed or criticized
  - ◆ Discussion occurs only *after* the brainstorming session is complete
2. Warm up the group by doing a “practice” exercise such as having everyone write down on a piece of scrap paper everything you can do with a ruler. Then go around the room and generate a group list.
3. Announce the related topic, problem, or question
4. Write the ideas and suggestions on a flipchart to prevent repetition and keep participants focused on the topic  
*Note:* It is helpful for your co-trainer to record the ideas while you call forth the ideas from the group. If there is no co-trainer, a trusted participant can function in this role. Be sure, however, that the participant chosen for this recorder role can keep up with a fast pace generation of ideas. Nothing impedes the brainstorming process more than a recorder who constantly asks for ideas to be repeated, words to be spelled or acronyms to be explained. Brainstorming can be a fast paced activity and generally generates a lot of energy and engagement.
5. Allow silence. Give participants time to think
6. Provide positive feedback to encourage more input from participants (i.e., Saying “these are great ideas...”)
7. Review written ideas and suggestions periodically to stimulate additional ideas
8. Conclude brainstorming when no one has any more ideas to add to the list
9. Review the final list before discussion

**Variation:**

A variation to the method described above is to ask each participant to write down his or her thoughts or ideas about the topic on post-it notes. The trainer then collects all the notes and quickly organizes them into categories. The participant group goes over the categories and responses under each one and discusses the similarities, differences, consistencies, inconsistencies and “take-home” messages.

## Training Method #4: Case Study

A case study is a written description of a hypothetical situation that is used for analysis and discussion. It is a detailed account of a real or hypothetical occurrence (or series of related events involving a problem) that participants might encounter. It is analyzed and discussed, and participants are often asked to arrive at a plan of action to solve the problem. Case studies can help group members learn to develop various alternative solutions to a problem and may help develop analytical and problem-solving skills.

Uses	Advantages	Disadvantages
<ul style="list-style-type: none"><li>• Synthesizes training material.</li></ul>	<ul style="list-style-type: none"><li>• Allows participants to relate to the situation</li></ul>	<ul style="list-style-type: none"><li>• Requires a lot of planning time if you need to write case studies yourself</li></ul>
<ul style="list-style-type: none"><li>• Provides opportunity to discuss common problems in a typical situation.</li></ul>	<ul style="list-style-type: none"><li>• Involves an element of mystery</li></ul>	<ul style="list-style-type: none"><li>• Requires careful design of discussion questions</li></ul>
<ul style="list-style-type: none"><li>• Provides a safe opportunity for developing problem-solving skills.</li></ul>	<ul style="list-style-type: none"><li>• Avoids personal risks by using hypothetical situations</li></ul>	
<ul style="list-style-type: none"><li>• Promotes group discussion and group problem-solving.</li></ul>	<ul style="list-style-type: none"><li>• Involves participants in an active manner</li></ul>	

### Process:

1. Introduce the case study to participants
2. Give participants time to familiarize themselves with the case
3. Present questions for discussion or the problem to be solved
4. Emphasize that there is not always only one right solution, if appropriate for the specific case
5. Give participants time to solve the problems individually or in small groups
6. Circulate among the small groups to:
  - ◆ Clarify any questions participants may have
  - ◆ Make sure that participants are on task



- ◆ Make sure that a few participants are not dominating the discussion
- 7. Bring everyone back together for a larger group discussion
- 8. Invite participants to present their solutions or answers
- 9. Discuss all possible solutions or answers
- 10. Ask the participants what they have learned from the exercise
- 11. Ask them how the case might be relevant to their own lives
- 12. Summarize the points made

### **Tips for developing case studies:**

- ◆ Develop a case study that is as realistic as possible
- ◆ Describe the people in the case study
  - ◆ Use names (but be sure to indicate that they are not the names of real people)
  - ◆ State their genders, ages, and ethnicities and other relevant characteristics
- ◆ Describe the specific situation
  - ◆ Think about the specific issues you want the participants to address
- ◆ Use the case study to challenge assumptions (e.g., health care worker doesn't always know the answers, patients aren't always uninformed)
- ◆ Avoid giving solutions to the problems raised in the case study
- ◆ Avoid making the case study too complex or too simplistic

### **Some examples of discussion questions that use the adult learning cycle as a model include the following:**

- ◆ Describe what you see and hear happening in this case study.
- ◆ What feelings does the case study evoke in you?
- ◆ What are the key issues that are brought to light by this case study?
- ◆ What do you think are some of the underlying causes that lead to these issues?
- ◆ What are some possible strategies for dealing with these issues?
- ◆ How can we each make a difference in addressing these issues?

## **Training Method #5: Demonstration**

A demonstration is a method for showing precisely how a skill, task or technique should be done. The trainer or a skilled participant shows other participants how to successfully perform a given task by demonstrating it, describing each step, and explaining the reasons for performing it in a particular way. It is often followed by a practice session in which the participants carry out the activity under the supervision of the trainer. It is basically a visual presentation accompanied by oral discussion in which psychomotor skills are taught. At appropriate points, the demonstrator stresses key points and discusses potential performance problems. For example, the use of models or props (e.g., silicone breast models or fecal occult blood collection kits) greatly enhances a training on self breast exam or colorectal screening. Having simulated or standardized patients for clinicians to practice new skills (e.g., performing clinical breast or pelvic exams) leads to effective acquisition of these new skills.

### **Uses:**

- ◆ Shows participants how to perform a skill (e.g., showing community members how to do a self breast exam or use the collection kit for a fecal occult blood test).
- ◆ Clarifies and correct misconceptions about how to performance task.
- ◆ Shows how participants can improve or develop skills.
- ◆ Models a step-by-step approach (e.g., how to do a clinical breast exam using the vertical strip method).

### **Advantages:**

- ◆ Provides learning experience based on actual performance; is very relevant to the participant's job or personal experience, especially when combined with hands-on practice
- ◆ Illustrates processes, ideas, and relationships in a clear and direct manner
- ◆ Requires low development costs
- ◆ Helps participants' focus their attention
- ◆ Involves participants when they try the method themselves.

### **Disadvantages:**

- ◆ Has limited usefulness.

- ◆ Requires a lot of planning and practice ahead of time.
- ◆ Requires facilities and seating arrangements that are carefully planned so all members of the audience have an unobstructed view of the demonstration
- ◆ Requires enough materials for everyone to try the skill being demonstrated
- ◆ Does not ensure that participants will immediately be able to duplicate the skill being demonstrated after seeing it demonstrated
- ◆ Requires that participants take passive role during demonstrations. This may cause them to lose interest, particularly during afternoon hours and toward the end of the session

**Process:**

1. Introduce the skill being demonstrated: What is the purpose?
2. Present the materials that are going to be used
3. Demonstrate the skill for participants
4. Repeat the demonstration, explaining each step in detail
5. Invite the participants to ask questions
6. Allow participants to practice the skill themselves
7. Circulate around to each person to:
  - ◆ Observe participants as they perform the skill
  - ◆ Provide them with constructive feedback
8. Bring participants back to the larger group
9. Discuss how easy or difficult it was for them to perform the skill
10. Summarize the “take home” messages or key points

### Training method #6: Role-Play

Role-play is a technique in which several individuals or a small group of participants act out a real-life situation in front of the group. The scenario of the role-play is related to the training topic. There is no script; however, the situation is described in as much detail as appropriate. The participants make up their parts as they act. The role-play is then discussed in relation to the situation or problem under consideration.

Uses	Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Helps change people’s attitudes.</li> </ul>	<ul style="list-style-type: none"> <li>• Provides opportunity for stimulating new ideas while having fun</li> </ul>	<ul style="list-style-type: none"> <li>• Requires that participants feel comfortable being in front of a group. Some participants may feel self-conscious, shy or may fear looking “ridiculous”</li> </ul>
<ul style="list-style-type: none"> <li>• Enables people to see the consequences of their actions on others.</li> </ul>	<ul style="list-style-type: none"> <li>• Engages the group’s attention</li> </ul>	<ul style="list-style-type: none"> <li>• Requires dyads or triads in which everyone is either acting or observing to address participant reluctance</li> </ul>
<ul style="list-style-type: none"> <li>• Provides an opportunity for participants to see how others might feel or behave in a given situation.</li> </ul>	<ul style="list-style-type: none"> <li>• Simulates the real world</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>
<ul style="list-style-type: none"> <li>• Provides a safe environment in which participants can explore problems they may feel uncomfortable about discussing in real life.</li> </ul>	<ul style="list-style-type: none"> <li>• Provides a dramatic way of presenting a problem and stimulating a discussion</li> </ul>	

Uses	Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Enables participants to explore alternative approaches to dealing with situations.</li> <li>• Examines a delicate problem in human relations.</li> <li>• Explores possible solutions to emotion-laden problems.</li> <li>• Helps change people's attitudes.</li> </ul>	<ul style="list-style-type: none"> <li>• Allows participants to assume the personality of another human being – to think and act as another might</li> <li>•</li> <li>•</li> <li>•</li> </ul>	

**Process:**

1. Prepare the actors so they understand their roles and the situation
2. Set the climate so the observers know what the situation involves
3. Observe the role-play
4. Thank the actors and ask them how they feel about the role-play. Be sure that they get out of their roles and back to their real selves
5. Share the reactions and observations of the observers
6. Establish ground rules for having a group discussion about the role-play
  - ◆ Make your comments in a self-oriented manner. Try to express **your feelings** as you were watching the role-play. For example, "The interaction in the role-play made me feel..."
  - ◆ Make your comments descriptive of what happened. For example, "I noticed that the woman had eye contact twice with her friend."
  - ◆ Try not to interpret the behavior of the players in terms of why they did what they did. If this seems necessary, however, ask the players in an open-ended way rather than putting words into their mouths (e.g., "I was wondering why you asked the woman her marital status.")

As a group leader, your attitude and direction in this discussion are important. Try to protect the role-players from too much exposure to

negative comments, and try to get the observers to put their comments in the form of suggestions on how to improve the handling of the situation. The best way to do this is to set the example yourself. Attempt to be as non-evaluative as possible: try to invite people to talk freely about their own experiences, and summarize the comments given in relation to the learning points.

7. Discuss as a group the different reactions to what happened
8. Ask the participants what they have learned
9. Ask the participants how the situation relates to their own lives
10. Summarize the main messages or points

When using role-playing as a training method, you might benefit from using one of the warm-up techniques described below:

**The pre-role-play discussion:**

- ◆ Start a discussion about the topic that is related to the role-play you want to use. For example, when your role-play objective is to develop skills in encouraging their women friends and relatives to get regular pap screenings, ask the group what they think the major barriers to pap screening are. Encourage everybody to participate in the discussion and air their feelings on the topic. Then, introduce the role-play as a way to experiment with ways to talk with others to overcome those barriers.

**The problem definition (often used after the discussion mentioned above):**

- ◆ Ask participants where they might have problems regarding the training topic at hand and put these on a flipchart. In the example above, ask the participants what might be difficult about talking to other women about pap screening. They might list “embarrassment of talking about a sensitive topic”, etc. Summarize the problems and introduce role-playing as an exercise that will touch on some of the problems and might provide new insights on ways to deal effectively with their concerns.

**The case discussion:**

- ◆ A prepared written case related to the topic you want to use in role-play is discussed first and possible solutions suggested. The role-play is introduced as a method to demonstrate how different people would handle the situation in various ways.

## **Participant resistance to role-play and some ways to handle it:**

Even after warm-up activities, there might still be some resistance to role-playing. Several types of resistance you might encounter are presented below and ways of handling them suggested.

### **Fear of exposure:**

- ◆ This usually relates to people's fear of being exposed to the total group and acting as a fool. One way of handling this is to use multiple role-playing rather than single role-playing. Divide the group in pairs and ask them to do their own role-plays in different corners of the room. Using this method, you should walk around to get a feel for how each dyad is doing and whether the role-play is being used the way it was intended.

### **What is going to happen to me?**

- ◆ Generally this refers to people's fear of not knowing the procedures involved in role-playing. This may be related to lack of knowledge about the topic or lack of role-playing skill. Usually a good explanation of the different steps in the session (warm-up activities, role-playing, discussion) clarifies the issue. You should ensure that people won't be criticized by acknowledging how difficult role-plays can be and thanking participants for their bravery in being willing to step outside their comfort zone to provide an excellent learning experience for everyone.

The most important thing in dealing with resistance seems to be to *allow* it to be there, accepting the feelings and thoughts behind it. But at the same time, you should try to be clear that you want to do the role-play and why. If you feel good about it, this will be reflected by your group.

## Training method #7: Video and Discussion

The use of videos or video segments in training is an effective way to view real-life or simulated interactions, discuss pros and cons of the interaction and engage in group problem-solving.

Uses	Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Creates an opportunity for participants to actively engage with the material</li> </ul>	<ul style="list-style-type: none"> <li>• Provides “real life” or simulated interactions similar to those of participants</li> </ul>	<ul style="list-style-type: none"> <li>• Depends on good discussion questions and skilled facilitator for maximum effectiveness</li> </ul>
<ul style="list-style-type: none"> <li>• Triggers discussion about key concepts</li> </ul>	<ul style="list-style-type: none"> <li>• Effective with large groups as well as small groups</li> </ul>	<ul style="list-style-type: none"> <li>• Darkened room might encourage participants to fall asleep</li> </ul>
<ul style="list-style-type: none"> <li>• Provides an opportunity to problem solve or discuss what was effective and ineffective in the video interaction</li> </ul>	<ul style="list-style-type: none"> <li>• Provides opportunity to model “correct” ways of interacting or conversing.</li> </ul>	<ul style="list-style-type: none"> <li>• Possible equipment failure</li> </ul>
<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Provides examples of incorrect ways of interacting for participants to critique</li> </ul>	<ul style="list-style-type: none"> <li>• Poor sound quality or distracting noises</li> </ul>
<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Stops short of resolving the problem so that participants can brainstorm solutions</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>

### Process:

1. Introduce video segment briefly to provide context
2. Be sure not to give too much explanation of what participants will be viewing



3. Select a segment that makes two-three key points. Avoid segments that solve a problem.
4. Give participants a couple of minutes to process what was viewed on the video before asking questions.
5. Ask a series of specific questions that encourage participants to think about what they saw and hear; how they felt about it; what the key messages are and what they would do the same or differently.

## Alternatives to Lecturing

ORID A Method for Guiding Discussions ( white page)

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ORID Discussion Model (green page)

## Working with Challenging Learners

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During training you may run into participants who pose some challenges to facilitation. Listed below are some different types of challenging participants with some suggested ways to work effectively with them.

(Adapted from Center for Substance Abuse Prevention (CSAP). Facilitation Skills Development Process. Rockville, MD: Center for Substance Abuse Prevention, Substance Abuse and Mental Health Services Administration, Department of Health and Human Services; 1994)

<b>Types of challenging participant</b>	<b>Why are they challenging?</b>	<b>Ways to work effectively with this type of participant.</b>
<b>“Know it alls”</b>	<ul style="list-style-type: none"> <li>◆ May actually have a lot of information about the topic but still could benefit from the experiences and perspectives of others</li> </ul>	<ul style="list-style-type: none"> <li>◆ Acknowledge that he is a wealth of information but emphasize that everyone is an expert</li> <li>◆ Acknowledge their expertise and ask to hear from others. (e.g. “It sounds like you’ve had a lot of experience with this. Let’s hear what others think.)</li> </ul>
<b>“I’m only here because I have to be”</b>	<ul style="list-style-type: none"> <li>◆ May have been required to attend the focus group, yet has no particular personal interest in the topic.</li> </ul>	<ul style="list-style-type: none"> <li>◆ Acknowledge that some of the participants are present because they have to be.</li> <li>◆ Ask for their assistance in making this a meaningful experience.</li> <li>◆ Ask specifically “How can I make this focus group helpful to you?”</li> </ul>
<b>“Naysayers”</b>	<ul style="list-style-type: none"> <li>◆ May be prejudiced.</li> <li>◆ Won’t budge.</li> <li>◆ Won’t accept your point of view.</li> <li>◆ Often disruptive and uncomfortable to the group</li> </ul>	<ul style="list-style-type: none"> <li>◆ Don’t put her down or make her feel isolated. Keep her involved, if possible.</li> <li>◆ Throw her view to the group by questions or examples. Try to get group to bring her around.</li> <li>◆ Say that time is short and you would be glad to discuss her issues with her individually.</li> <li>◆ Ask her to accept the views of the group or the focus group leader for the moment.</li> </ul>

<p><b>“The Talker”</b></p>	<ul style="list-style-type: none"> <li>◆ May be an “eager beaver” or a show-off.</li> <li>◆ He may be exceptionally well informed and anxious to show it, or just naturally wordy.</li> <li>◆ He may need to be “heard” because he is still working through difficult emotional issues.</li> </ul>	<ul style="list-style-type: none"> <li>◆ Don’t be embarrassing or sarcastic...you may need his help later on.</li> <li>◆ Slow him down with some difficult questions.</li> <li>◆ Interrupt tactfully with something like: “That’s an interesting point...now let’s see what the rest of the group thinks of it.”</li> <li>◆ In general, let the group take care of him as much as possible.</li> <li>◆ Avoid eye contact.</li> <li>◆ Give him a role.</li> <li>◆ State your role is to keep people on time.</li> <li>◆ Quick interruption – move to him and put your hand on his shoulder.</li> <li>◆ Paraphrase what he says and move on.</li> <li>◆ Acknowledge that his story is important and you and others would love to hear it later or after the focus group.</li> </ul>
<p><b>Inaccurate commentators</b></p>	<ul style="list-style-type: none"> <li>◆ Comes up with a comment that is obviously incorrect</li> </ul>	<ul style="list-style-type: none"> <li>◆ Don’t ever put him down or make him feel stupid. Must be handled positively and delicately.</li> <li>◆ Ask if others have the same perspective.</li> </ul>
<p><b>“Clashers”</b></p>	<ul style="list-style-type: none"> <li>◆ Two or more participants strongly disagree or bring personalities into the discussion. This can divide your group into factions.</li> </ul>	<ul style="list-style-type: none"> <li>◆ Emphasize points of agreement, minimize points of disagreement.</li> <li>◆ Point out how argument has been productive in illustrating certain points.</li> <li>◆ Draw attention to objectives and ground rules of the session, cut across the argument with a direct question about the topic.</li> <li>◆ Keep your cool. Ask that personalities be omitted or that arguments be productive and directed toward topic definition or resolution.</li> <li>◆ Stay neutral.</li> <li>◆ Stick to the topic.</li> <li>◆ Acknowledge emotionality of topic.</li> </ul>

<p><b>“Side conversation-ists”</b></p>	<ul style="list-style-type: none"> <li>◆ Has conversations with her neighbors that may or may not be related to the topic but is distracting to other focus group participants or you.</li> </ul>	<ul style="list-style-type: none"> <li>◆ Don’t embarrass her.</li> <li>◆ Call her by name; ask an easy question,</li> <li>◆ Call her by name, and then restate last opinion expressed or last remark made by group, and ask her opinion of it.</li> </ul>
<p><b>“Questioners”</b></p>	<ul style="list-style-type: none"> <li>◆ May be genuinely curious.</li> <li>◆ May be “testing” you by putting you on the spot</li> <li>◆ May have an opinion but not confident enough to express it</li> </ul>	<ul style="list-style-type: none"> <li>◆ Acknowledge that he seems to have a lot of questions about a particular topic.</li> <li>◆ If the questions seem like legitimate attempts to gain content information (which other members of the group already know), tell him that you will be happy to work with him later to discuss his questions.</li> <li>◆ Reframe or refocus. Send the questions back to the questioner</li> </ul>
<p><b>“Ramblers”</b></p>	<ul style="list-style-type: none"> <li>◆ Talks about everything but the topic</li> <li>◆ Uses inappropriate or farfetched examples from her own experience</li> </ul>	<ul style="list-style-type: none"> <li>◆ When Rose stops for breath, thank her, refocus attention by restating relevant points and move on.</li> <li>◆ Smile, tell her that her point is interesting, make whatever application you can with it, and indicate in a friendly manner that we are a bit off the subject.</li> </ul>
<p><b>“Shy and Timids”</b></p>	<ul style="list-style-type: none"> <li>◆ May feel timid or insecure.</li> <li>◆ May be bored or indifferent</li> </ul>	<ul style="list-style-type: none"> <li>◆ Try to arouse her interest by asking her an easy direct question. Talk to her on a personal basis with the group looking on.</li> <li>◆ Ask questions of the person next to Sara and then ask the Sara to respond to that.</li> </ul>

<p><b>“Off-based commentators</b></p>	<ul style="list-style-type: none"> <li>◆ Isn't rambling, but makes comments that are not relevant to discussion</li> </ul>	<ul style="list-style-type: none"> <li>◆ Say, “How would you relate this to the discussion at hand?”</li> <li>◆ Say, “It sounds like what you are saying is” and then rephrase. Then clarify, “is that a fair statement of your point?”</li> <li>◆ Reframe/refocus onto the topic.</li> <li>◆ Say where his comment fits into the discussion.</li> </ul>
<p><b>“Arguers”</b></p>	<ul style="list-style-type: none"> <li>◆ Has a combative personality</li> <li>◆ May not want to be at the focus group</li> <li>◆ May be upset by personal/family health issue</li> </ul>	<ul style="list-style-type: none"> <li>◆ Keep your own temper firmly in check. Don't let the group get excited either.</li> <li>◆ Honestly try to find merit in one of his points (or get the group to do it)...then move on to something else. “That was a good point” or “We've heard a lot from Arthur, who else has some ideas?”</li> <li>◆ If facts are misstated, ask the group for their thoughts.</li> <li>◆ As a last resort, talk with him in private, find out what's going on, and ask for cooperation. For example: say “Let's talk at the end of the session.”</li> </ul>
<p><b>“Grippers”</b></p>	<ul style="list-style-type: none"> <li>◆ Has a pet peeve with you, the group, the subject, the health care system, etc.</li> </ul>	<ul style="list-style-type: none"> <li>◆ Indicate that you'll discuss the problem with her privately later.</li> <li>◆ Throw the issue back to the group. Have a member of the group answer her.</li> <li>◆ Indicate time pressures.</li> </ul>
<p><b>“Emotionals”</b></p>	<ul style="list-style-type: none"> <li>◆ Becomes very emotional during training.</li> <li>◆ May be needing lots of support</li> </ul>	<ul style="list-style-type: none"> <li>◆ Offer support by saying “It seems like you're feeling very upset right now.”</li> <li>◆ Make sure she feels free to leave the room if she finds it's necessary to take care of herself.</li> <li>◆ Allow other participants to comfort her.</li> <li>◆ Use the co-facilitator to comfort her.</li> <li>◆ Encourage her to talk with you or others during break or at the end of the focus group.</li> </ul>



## Principles of Adult Learning

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Learners learn best when...	The role of the trainer is to...	Training strategies include...
1. They feel valued and respected for the experiences and perspectives they bring to the training situation	Elicit 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 actually fills their immediate needs	Identify learners' needs and tie training concepts into these identified needs.	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	Make sure that training content and skills are directly relevant to learners' experiences so that they will want to learn.	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 and skills that will be covered.	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 address knowledge, attitudes and skills.	While designing the course, keep a list to make sure you are employing a variety of methods

Learners learn best when...	The role of the trainer is to...	Training strategies include...
7. New material is related to what learners already know	Use training methods that enable learners to integrate the new material.	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 assure 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 training methods that allow learners to practice new skills and insure 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 new information & 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 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
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Learners learn best when...	The role of the trainer is to...	Training strategies include...
<p>12. The trainer values their contributions as both a learner and a teacher</p>	<p>Encourage learners to share their expertise and experiences with others.</p>	<p>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</p> <p>Remember to ask learners to respond before providing answers</p> <p>If someone asks a question and you don't know the answer, ask learners if they know or could find out</p>

