

Training of Trainers Information

Developed by Deborah Werner for UCLA Center for Health Policy Research Health DATA Program

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1. Characteristics of Effective Trainers

What is a Trainer?

A TRAINER IS:

- **Expert in a knowledge area.** Trainers serve as experts in a content area. Trainers know how to help participants do the training activities. Participants want to learn from experts.
- **Facilitator of a learning process.** Trainers identify learning objectives. They keep discussion and activities focused. They offer different formats for participants to learn new concepts, identify how they fit new ideas with existing values and knowledge, and apply them. Trainers protect minority opinions. They create safe learning environments for diverse audiences. They are timekeepers. They make sure that people learn in a limited time.
- **Coordinator of a series of activities.** Most training workshops involve a series of activities and learning methods that help participants develop knowledge, attitudes, and skills.

Conducting a training workshop is different from a presentation. In a presentation, the information itself is the center of attention. The intention is to provide information.

In a training workshop, participants **apply** new information.

Training adults means being flexible, balancing diverse needs, and offering participants ways to apply the material in a limited time.

WHY TOO MANY TRAINING SESSIONS FAIL TO TEACH

- The trainer lectures. Participants do not have a chance to speak.
- The trainer ignores what participants want. Adults must be motivated in order to learn.
- The trainer bores the audience. To get and keep people engaged involves use of media and activities.
- The training gives too much information. Too much information is overwhelming.
- Participants are uncomfortable. The room is hot. The room is cold. The chairs are hard. Participants are hungry.

Trainer Skills Checklist

- **Put a check** beside all of the statements you feel describe your strengths.
- **Circle the box** beside the statements that describe areas you need to improve.
- You know yourself. You are confident and fully prepared. You are just nervous enough to keep alert.
- You know your subject matter. You have studied your topic. You have experience.
- You know your audience. You respect your participants. You listen to them and call them by name.
- You are neutral and non-judgmental. You value everyone's experience. You value everyone's right to different perspectives. You respect differences of opinion and lifestyle.
- You are culturally sensitive. You are aware that your cultural background shapes your thinking. You know your participants' cultures shape their thinking.



- You are self-aware. You recognize your own biases. You know your own “hot-buttons.” You control yourself when someone pushes your “hot-buttons.”
 - You are inclusive. You encourage everyone to participate and contribute to the group learning process.
 - You are lively, enthusiastic, and creative. You use humor. You make contrasts and comparisons. You use suspense. You keep your listeners interested. You challenge their thinking.
 - You use a variety of vocal qualities. You vary your pitch. You vary your speaking rate and volume. You avoid monotones.
 - You use your body well. You move naturally. Your body language matches your subject matter.
 - Your comments are clear and easy to remember. You present one idea at a time. You show relationships between ideas. You summarize.
 - You use illustrations. You use examples, charts, visuals, and audio aids to illustrate your subject matter.
 - You understand group dynamics. You are comfortable with conflict resolution.
 - You are flexible. You watch your participants’ verbal and nonverbal responses. You adapt your plans to meet their needs. You are in charge without being overly controlling.
 - You are open to new ideas. You are aware that you don’t know all the answers. You recognize that you can learn from participants.
 - You are compassionate. You are empathetic and understanding about participants’ emotional reactions.
 - You are interested in evaluating your work. You encourage feedback.
- Think about one or two things that you could do to build on your strengths. How will you work on the areas that need improvement? Jot down your ideas for improvement at the end of the checklist.

EIGHT WAYS TO PREPARE FOR A WORKSHOP

Here are 8 activities that can help trainers prepare for a workshop.

1. BE PREPARED

Take time to learn the material. Find meaningful activities that promote learning. Organize your discussion questions. Pre-view materials. Create back-up plans. If you do the background work then simple exercises can help you relax and offer a successful training.

Create a routine that gives you a sense of familiarity and comfort.

Get a good night's rest. Eat well. Allow enough time for traffic. Arrive early.

2. KNOW YOUR STRENGTHS AND WEAKNESSES

Know your strengths and weaknesses. Some trainers are great storytellers. Others excel at linking current material to participants' experiences. Some trainers start workshops strongly and lose energy toward the end of the day, while others start slow and gain momentum. Design the training experience to maximize your effectiveness.

3. MAKE A LIST OF WHY YOU CAN DO THE TRAINING

Self-doubt breeds nervousness; nervousness breeds self-doubt. If you feel insecure, make a list of examples of why you can do this.

Think about your strengths. Write down specific ways your strengths contribute to the success of the training:

- Think about your accomplishments. Write them down.
- Think about your knowledge of the subject matter. Write it down. Think about ways you have coached or supported others. Write them down.

- If you get stuck, think about why you were invited to give the workshop. What strengths do others see? Write them down.

Carry the list with you. Look at it. When you have doubts, look at your list. You may want to memorize the list and recite it back to yourself at moments when you feel insecure about your capabilities.

4. ASSESS PARTICIPANTS

Get a sense of who is attending the training. What do they want to know? How many people are expected? How many agencies will send participants? What are their experiences, education, and work? What are their cultural backgrounds? Why are they attending the workshop? Plan your workshop around the needs of your participants.

5. LEARN SOMETHING NEW ABOUT THE SUBJECT MATTER

Sometimes trainers lose interest in a training topic. Learn something new about the subject matter. Find new exercises. Keep the subject fresh and interesting. If a subject bores you, your participants will be bored. Remember you set the tone for learning.

6. BE FAMILIAR WITH YOUR MEDIA

Technology, audio-visuials, videos, and training workbooks boost training. Know your media. Be sure that all equipment is in working order. Are the slides, videos, and workbooks handy? Thoroughly checkout your equipment to make sure it is in good working order. Have a back-up plan if your equipment fails you.

7. MANAGE STRESS

There are activities you can do to control the natural stress that arises before and during the training. Here are a few we recommend.

a. PHYSICAL EXERCISES

Physical exercises help trainers relax. Here are two of our favorites.

Cross Crawl. Stand in an area where you have plenty of room. Put your arms out to your sides. Touch your right hand to your left knee. (If you can, lift your left knee up in the air rather than bending.) Return knee to ground and right arm to side. Touch the left arm to the right knee. Return. Repeat over and over again.

Another good exercise is called lazy 8s. Draw, with finger or pencil, both hands or one, in the air or on paper, sideways 8's over and over.

b. DRINK WATER

Drink water. It reduces stress and supports your voice. Have water at the podium. If you start to cough (or get too scared), take a slow breath and a sip of water. Be careful not to drink too much. You might have to use the restroom before the planned break.

c. PRACTICE BREATHING

Take a few cleansing breaths. Help focus your mind. Use deep breathing before the workshop begins. Breathe in through your nose slowly for a count of 8. Hold the breath in your lungs for a count of 8. Breathe out for a count of 8 (make sure the breath is completely exhaled). Repeat. Concentrate on breathing. If your mind strays bring it back to counting and "Air in.... Hold ... Air out."

d. RELAX

Develop stress-reducing activities. Some trainers relax with abalone with sage, sweet grass, and cedar. Other methods include meditation, tai chi, running, eating right, and personal reflection.

8. GET TO KNOW A COUPLE OF PARTICIPANTS

Arrive early. Meet a couple of participants. Greeting participants makes everyone more comfortable.

2. How Adults Learn:

Adult Learning Theory and Practice

Adults learn differently from children. This section reviews adult learning theory and its affect on strategic (what to do) and tactical (how to do it) issues in training.

Learning strengthens the brain, increasing connections and new pathways in the brain. This requires energy. Adult students must be motivated to exert the energy necessary to learn.

Adult learning theory focuses training more on motivating the participants and less on the content objectives. Adults learn knowledge, attitudes, and skills when they are actively involved.

15 THINGS WE KNOW ABOUT ADULT LEARNERS

- Adults bring knowledge and their own ways of doing things to the class.
- Adults learn when they have a need to learn, not just for the sake of learning.

- Adults must connect what they are learning with their existing knowledge, beliefs, and skills. Learning moves slowly through this process.
- Adults have expectations. They generally know what they want from a training experience.
- Adults take fewer risks. They tend to take errors personally.
- Adults require motivation to participate in a training experience. They are motivated to learn when they see:
 - The topic as meaningful
 - The tasks are obtainable
 - The feeling or tone is positive
- Adults respond to respect and recognition. Capitalize on their experience. Reward their participation.
- Adults must apply what they learn in order to remember it.
- Consider physical limitations. Never use a font smaller than 12 point – 14 or 16 is best. Sitting for too long and uncomfortable rooms detract from the learning experience.
- Approaches that encourage adults to express their feelings, beliefs, and attitudes open them up to learning.
- Adult like as much control as possible. Offer choices and self-directed exercises where they control the work of learning.



Audience Diversity

Different people learn differently. Creating an active learning experience means creating a training workshop that is meaningful for people with different values, different life experiences, in different life stages, and with different educational experiences.

TYPES OF DIVERSITY IN TRAINING

- Work diversity
- Diverse perspectives on authority
- Cultural diversity
- Diversity in educational levels
- Diversity in learning styles
- Hierarchy diversity
- Diverse expectations
- Age diversity

EFFECTIVE TRAINERS CREATE INCLUSIVE LEARNING ENVIRONMENTS

- Prior to the training, evaluate program media and examples. Do they represent the diversity of the audience?
- Do not use materials with very small writing or small print.
- Use a translator when needed. Provide background information to the translator ahead of time. Offer small group exercises in participants' languages. Shorten lectures to allow for the time involved in translation.
- Recognize that psychological, social, and cultural conditions affect a learning environment.
- Consider the systems of power and hierarchy. If people's supervisors' or CEO are present, it can influence the learning environment. Select appropriate course content.
- Gather as much information as possible about the audience before the workshop. Prepare exercises and information that will help participants apply the training content.

- Equalize the power between yourself and participants. Recognize and value the knowledge and experience that participants bring to the training.
- Create a comfortable environment for adult learners. Arrange the room to encourage equal participation.

Creating A Learning Environment

Comfort is important for adult learning. Training environments should be physically and emotionally comfortable. Uncomfortable adults resist training. Before the training session, review the agenda and the training site. Make changes to promote comfort.

Some questions to consider:

- Does the set up encourage conversation?
- How is the sound in the room?
- Is there natural light? Enough light?
- Will people be able to hear/see the audio-visuals?
- Will it be comfortable for those who did not do well in school?
- Does the environment communicate respect?
- Do you have control over the room temperature? How do you fix the temperature if it gets too hot or cold?
- Will the group and planned activities fit in the space? Can chairs move to accommodate small groups? Is there an alternative space that can be used so that the groups do not disrupt each other?
- Avoid auditorium style rooms. They are designed for passive listening.
- Will participants have the opportunity to move at least once every 50 minutes?
- How should the chairs be organized?
- Are there tables for participants to use for writing?

Is the space less than ideal? Do not give up. Think about ways to arrange it. You can usually improve the space.

Training Methods and Learning Activities

Adults learn best with training that actively involves them. Active learning techniques are interactive and participatory. Participants engage in discussion, application, or activities. Trainers design active learning techniques that meet the goals of the training and give participants results they can use.

PHASES OF ADULT LEARNING

Participatory training moves people through 4 phases of the adult learning cycle: experiencing; processing; generalizing; applying. Plan to move people through the 4 phases at least once every 4 hours.

Phases of Adult Learning

- 1) Experiencing: Do an exercise or activity together.
Draw on shared experience
- 2) Processing: Reflect on the content. Share observations and feelings about the experience.
- 3) Generalizing: Draw meaning from the experience.
Compare it to other experiences.
Identify general principles or patterns.
- 4) Applying: Take action. Develop an action plan. Put the action plan to use.

Many training sessions use a lecture followed by questions and answers, small group discussions, and an experiential activity. This format may be the easiest for trainers, but adults learn best when they are actively involved in ways that help them discover learning.

People remember:

- 20% of what they hear
- 30% of what they see
- 50% of what they see and hear
- 70% of what they see, hear, and say
- 90% of what they see, hear, say, and do

Workshop participants should “see, hear, say, and do.”

Tips and Strategies to Promote Active Learning

- Avoid lecturing. The best training draws content from participants. The trainer summarizes the message rather than “telling the message.”
- If you must lecture — use visuals. Use demonstrations, videos, and other audiovisuals to make your point.
- Let participants know what to expect. Tell participants the learning objectives at the beginning of the training.
- Give small amounts of information at a time. Give the opportunity for feedback. Check frequently to see if participants understand the material, then move on to the next block of information.
- Allow time for participants to think through the information.
- Have information and activities for advanced learners.
- Be sure participants know why the information is good to know. Use examples from their experience to demonstrate how they can use the information.
- Be sure participants feel positive about learning it.
- Be sure it meets knowledge and skill levels of participants.
- Do not speak for more than twenty minutes without a break for questions or a participatory exercise.
- Summarize topics. Make transition statements that bridges one topic to the other in the next segment of the training.

Training Techniques for Active Learning

When designing training, it is best to use at least one active method for each passive (lecture, video) method used. Here are several learning strategies that encourage active learning.

SMALL GROUP DISCUSSIONS

Talking helps adults relate topics to their existing knowledge and experiences. Break into small groups to allow several participants to talk about the subject at once. Ask participants to identify one person to facilitate the discussion. Ask another to report on the small group discussion. Provide specific questions to help the discussion stay focused.

GAMES

Games help relax a training environment. Many games can be adapted to training content. Consider adapting bingo, telephone, pictionary, and charades. Games give participants the opportunity to relax, move around, and “mull over” training information. Games allow participants to try new processes, evaluate communication, and use team-building strategies.

FISH BOWLS

Have several experts (outside experts or participants in the training) sit together. They discuss an issue while everyone else watches. Audience members hear different perspectives, identify controversy, and see how an idea fits with their own values.

DEBATE IT

Invite debate to allow participants to become more familiar with a subject. People with diverse viewpoints can identify points in common and places where their opinions differ. Debates also help participants identify counter arguments they can use against opponents.

SIMULATIONS

Use simulations. Participants can apply concepts in “real life” situations. Participants use the data provided in the simulation and analyze the situation. They apply new skills and attitudes to “work through” how to put the concept into operation.

HANDS-ON-PLEASE TOUCH

Use hands-on participation especially when working with technology. Give participants real data to use in training exercises. Hands on approaches reduce barriers to understanding that which is unfamiliar to the participant.

LET'S SEE IT

Encourage participants to make graphs, charts, or pictures. This allows participants to be creative. They can see the material and integrate it into their existing knowledge.

SURVEYS

Use a verbal survey of questions about a topic to measure the group's understanding. If the group answers the questions, reinforce that they know the material. If they miss a question, provide the answer before moving to the next topic.

BRAINSTORMING

Write the topic for the brainstorming on the top of the easel paper. Everyone should be able to see it. Encourage participants to contribute ideas. Take turns so each person has an equal opportunity to contribute. Go around the group repeatedly, person by person, until everyone passes. This makes sure you get all the ideas on the paper. Write each idea on the paper. Use the words of the person giving the idea. No idea is criticized or praised. After brainstorming, check the list to make sure everyone understands each idea. Eliminate duplicates only if they are identical. Sometimes differences in wording are important.

CASE STUDIES

Case studies allow participants to problem solve together. Encourage the group to pay attention to their group dynamics. Who is doing the most talking? How are decisions made? Is it an inclusive process? Participants may learn more from how they resolve a case than from the case itself.

ROLE PLAYS

Role-plays can demonstrate a particular concept. Have all participants do role-playing at the same time. After the role-play, review the situation and identify strengths and weaknesses in each role demonstration.

REFLECTIONS OR INTROSPECTION

Give participants questions about the material and its application. Allow time for them to write answers independently. Invite them to share their answers in a small group (or with the larger group). The final question may move to the next section of material.

MAKING ASSUMPTIONS

Ask participants to make assumptions about the political, technological economic, and socio-demographic environment. Ask them to consider the implications of each assumption for their organization.

SELF-DIRECTED OPPORTUNITIES

Some participants might want advanced content. Participants with more experience might have a special session. They might lend their expertise to the group. It might be useful to have readings and questions that experienced participants can summarize for the other participants in the workshop.

ASK IT BASKET

An Ask-It-Basket allows anonymous questions or comments. Provide small pieces of paper and a basket or hat for the papers. Invite participants to write questions down on the papers. Read them and invite responses. (A facilitator might read and organize the questions to insure all are addressed.)

VISUALIZATION

Invite participants to picture themselves as trainers. "What are you doing? How does it feel? What do you wish you had? Who are you with?"

DIALOG CIRCLE

Some participants dominate discussion. Use a dialog circle to give all participants the opportunity to speak. Dialog circles grew out of Native American traditions, where a feather specifies the person who is speaking. A person speaks and passes the feather to the next person.

ICEBREAKERS

Icebreakers help participants become familiar with each other and create an environment conducive to learning. You may have participants seated in the same area introduce themselves to each other and their expectations for the workshop. Have one person in the group summarize who is in the group and summarize expectations they have in common.

TOPIC LEAD-INS

Topic lead-ins help move from one topic to another. They generate interest in a topic and activate participants' prior knowledge of the subject. Topic lead-ins encourage sharing of experience, learning needs, resources, and expectations. Open-ended questions are a good way to lead into a topic. For example, ask the group what are the health concerns of their community as a lead-in to a discussion about how to do a community health assessment.

Identifying and Applying Training Methods and Learning Activities Review & Discussion

Participatory training works best with adult learners. Participatory training is active learning. Participants discuss and apply new knowledge and skills. Participation fosters learning. Participants move through the four phases of adult learning. Each phase occurs at least once per module or once in a four-hour session:

Phases of Adult Learning

- 1) Experiencing: Do an exercise or activity together.
Draw on shared experience.
- 2) Processing: Reflect on the content. Share observations and feelings about the experience.
- 3) Generalizing: Draw meaning from the experience.
Compare it to other experiences.
Identify general principles or patterns.
- 4) Applying: Take action. Develop an action plan.
Put the action plan to use.

Participatory training uses principles of adult learning. It enhances learning. Participants learn and remember what they “see, hear, say, and do.”

Adults have diverse learning needs. Effective trainers use methods that facilitate learning. They create comfortable, organized, and convenient learning environments.



4. Developing the Workshop Training Plan

Once you know who you plan to train and have reviewed the curriculum, you are ready to complete a Workshop Training Plan. The plan is an important tool. It includes:

- Detailed directions for all training activities
- The allotted time for each activity
- The training materials for each section
- Instructions for applying training methods

You will want your plan to be focused and detailed. With more experience, you may expand the scope of your training. Make your first training manageable, with realistic—achievable—goals and objectives.

Elements of the Training Plan

The Workshop Training Plan considers all elements of the learning experience and how they are addressed.

- 1. Think about the needs that the training is filling.** What do the sponsors expect/need from the training? What do the participants expect/need from the training? What do the participants need to accomplish their goals?
- 2. Choose information, knowledge, or skills that participants need to know.** Focus your training plan on key steps needed to build knowledge and skills specific to your participants. Use your knowledge of their learning needs and the topic to design the training.
- 3. Think about the learning objectives that you want your participants to achieve.** What do you want the participants to be able to do? Are there particular skills, knowledge, and attitudes you want them to demonstrate? How will you know they have learned?
- 4. Match objectives to training and evaluation methods.** There is a sample evaluation form with this guide. You may want to add other evaluation measures. You may want to know which learning activities your participants found most useful. Was a piece of information you provided applicable to their needs? Was the environment comfortable and convenient?
- 5. Consider what motivates the participants.** Why are they there? What do they want to learn? What do they already know? What are the demographic, work, educational, language, and subject matter backgrounds of the participants?
- 6. Who are your participants?** Are they from diverse backgrounds? Do they share a common goal? Do they know each other? Do they have resources available? Are there any visual, movement, or hearing abilities to consider?
- 7. Create a balanced training plan.** Some people learn best by listening, others by seeing, and others by doing. Adults need the opportunity to discuss and apply information. Identify the key points that you want people to learn. Create building blocks for each key point. Identify the best teaching methods for each building block.
- 8. Review training plan.** Is it an active plan? Motivate participants. Reinforce what they learn. Help them apply what they learn. Make transitions. Can you include activities for those with higher/lower levels of knowledge than most of the group?
- 9. Review training plan.** Does it meet the needs of people with varying abilities? Can it be improved?
- 10. Prepare back up exercises.** The group might have different expectations or the group size might be different. Do not go back to the lecture ... questions ... lecture format.
- 11. Include rest and food breaks in the training schedule.** Prevent stress and tiredness in everyone. Breaks allow everyone to move around and stretch.
- 12. Be prepared to have fun.** When the trainer has fun, the participants are more likely to have fun.

Conducting the Workshop

Before the Workshop

- Test all audio-visual equipment and videos.
- Check written materials. Be sure you have everything you need.
- Make sure the room is set up with tables and chairs. Can participants work in small groups on learning activities?
- Hang blank easel paper to use for recording expectations.
- Hang directional signs to help people can find the location.
- Organize workshop materials

GETTING STARTED

Welcome participants. Ask them to sign-in. Give them their learning materials and nametags. Start on time. Start with a round of self-introductions where participants give their names, organizations they represent, and their expectations for the workshop. Write their expectations on the paper. You'll use this information to identify those expectations that will be met by the workshop and those that will not. This will give you an opportunity to assess actual participants and their learning needs.

ESTABLISH AN AGREEMENT OF WHAT TO EXPECT

Participants need to know what to expect and what is expected of them. Review their list of expectations. Identify those items that the workshop will cover and what is expected of participants.

- State goals and objectives for the training
- Review the agenda
- Acknowledge participants' experience and knowledge
- Identify amenities, such as the bathrooms, phones, food, and drinks.

ESTABLISH GROUND RULES

- Honor everyone's input
- Value each person's opinions
- Agree to disagree
- Speak one at a time
- Start and end on time

Facilitate the Training Experience

USE OPEN ENDED QUESTIONS

Stimulate discussions. Ask open-ended questions—where, when, what, how, and why—that checks for knowledge and understanding. “How would you apply this technique?” “What new information have you learned during the group activity?” “What information may be used against your position?”

BE AN ACTIVE LISTENER

To listen actively:

- Rephrase participants' words. Check for understanding of what is said.
- Ask for clarification.
- Connect participants' points to the topic.
- Maintain open body language.
- Make eye contact with speakers.
- Acknowledge understanding.

CHECK FOR UNDERSTANDING AND ALLOW PARTICIPANTS TO CATCH UP

Ask participants if they understand the topic. Ask if they understand instructions for learning activities. Make adjustments if participants misunderstand the material. Offer help with concepts or skills.

Manage the Time

Trainers engage participants and facilitate their understanding of a topic in a limited time. You control the time. Identify when breaks are to begin and end. Control discussions; table discussions that are off-topic. Write them on the chart paper. Indicate another time to address them.

CLOSING ACTIVITIES

Ask participants to summarize what they found useful. Review expectations stated at the beginning. Check that items were covered as expected. Summarize key points learned during the workshop

Follow-Up Strategies

When adults immediately apply information (ideally with feedback), they are more likely to remember what they have learned. Help participants identify at least one way to apply the material and skills from the workshop. Encourage follow-up among participants after the workshop. Provide participants with written materials that they can use when they leave the training session. Be sure that participants understand handouts and how to use them.

After the training, evaluate the effectiveness of the training at meeting its goals. Find out if participants were able to use the training materials in their situations.

