

Training Methodologies

Author: Me & My Shadow / Tactical Tech

Last updated: February 2018

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This document was created as part of the Me and My Shadow training curriculum:

<https://myshadow.org/train>

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1. Underlying Principles of Adult Learning

Trainings for adults tend to take place over a short but intense period of time. As such, you'll want to make sure that each session is as effective as possible.

Below are some general observations on how adults tend to learn. The section on "Designing Individual Sessions" offers some practical tips on how to turn these underlying principles into structured training sessions.

1.1 Adults must *want* to learn

- **As adults, we generally want to know *why* we need to learn something.** We tend to most effectively learn a new skill or acquire a particular type of knowledge when we have a strong inner motivation to do so; if there is a convincing answer to the question, "How is this going to help me?"

- **As trainers, this means we need to think about:**
 - how we can *elicit* what participants want to learn;
 - how we can *pitch a topic* most effectively; and
 - how we can *sustain interest and conversation* through the training itself.

1.2. Adults will learn only what they feel they *need* to learn.

- **“How is this going to help me *right now*?”** Adults are mostly result-oriented and we tend to want immediate rewards for what we invest in. In this case, participants will be investing their time, and will want to get something out of it.
- **Acknowledge that needs will vary:** Participants will be coming in to the workshop with specific individual needs, and these might be different! The challenge is to try and make sure everyone is catered for in some way.
- **Be practical and direct.** If some questions are off topic, you can respond by saying that the question is addressed in another workshop on offer, or can be discussed afterwards in off-workshop time.

1.3. Adults learn by doing

- **Do “hands-on” exercises where possible.** Adults need to be able to use their new knowledge and skills fairly immediately, so that they see the relevance of them. That is why adult learning spends a considerable amount of time doing hands-on exercises (“experiential learning”). Make most use of the learning cards and handouts so participants get as much hands-on work as possible; incorporate drawing exercises where this makes sense.
- **Offer further resources.** Try and give participants additional printed materials and/or links to practical online resources where these exist.

1.4. Adult learning focuses on problems, and the problems must be realistic

- **Assess ability and expectation.** Begin by finding out what participants *can do*, as well as what they *want to do*.
- **Anticipate gaps** in skill and knowledge, and prepare practical activities to teach those specific skills or knowledge.

1.5. Experience affects learning

- **Acknowledge and build on participants’ previous experience.** Adults tend to have strong opinions and positions on specific topics and issues, stemming largely from their own individual experiences. Recognising participant's experiences helps a lot in focusing the discussions and conversations. Bringing out their experiences during the workshop can also help when it comes to meeting their expectations.
- The workshop itself also offers us the opportunity to provide new, positive experiences.

1.6. Adults learn best in an informal situation

- **Involve participants in the learning process.** Let them discuss issues and decide on possible solutions.
- **Keep the environment informal.** Although the workshops are actually quite structured, it is important to make the participants feel that it is not formal. Make the environment as relaxed, informal and inviting as you can.
- **Encourage questions.** Make sure that participants ask questions immediately and often. Emphasise that "there are no stupid questions".

1.7. Adults want guidance - not to be told what to do.

- **Present options, not instructions.**
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2. Organising a training

2.1 Choosing a structure

- In organising a training, first think about what structure the training will take. This will depend on, among other things, available time and resources, participant numbers, and training goals.

Possible structures include:

- Short workshop
 - Longer training or sprint
 - One-on-one
 - Discussion groups
 - Informal "Hackspace"
- **Also think about the longer term:** Is there a possibility for follow-up? This makes a difference in helping things to "stick".
 - **Map out the basic parameters:**
 - **Length:** How much time do you have? what is realistic?
 - **Number of participants & trainers:** In most cases, there should be at least one trainer per 8 participants; this can be stretched to 1:15 for a short (e.g. one hour) workshop. If doing hands-on work, ideally there should always be a minimum of two trainers.
 - **Type of participant:** Are you focusing on a specific group? (age, socio-economic profile, gender, etc)
 - **Venue:** What resources do you have?
 - **Training needs:** What are the needs of your participants? See more on designing needs assessments later in this document.

2.2 Choosing a venue

What makes a good space for learning?

- informal
- big enough, with enough chairs
- well-lit
- airy
- enough wall space for activities
- enough power outlets
- enough space for group activities and breakout groups
- not too noisy
- a little bit isolated - external people should not be walking past
- if you choose a venue that also hosts other groups, it can be good to check which groups are using the building at the same time.

2.3 Logistics

- **Materials:** What materials do you need? Who will provide these? Don't forget to include facilitators' needs in your planning (e.g. Will they need a printer? Do you have enough ink?). If you're going to need an internet connection, check the reliability of this beforehand.

At minimum you will need:

- enough pens (at least one per person)
- paper (don't expect people to bring their own paper)

You will probably also need:

- markers
- flipchart / whiteboard
- big pieces of paper
- post-its
- any supporting materials for specific activities (print-outs etc)
- projector and screen/wall-space
- speakers & connector cords
- tape (to stick paper onto walls)

- **Food.** Food plays an important but sometimes overlooked part in creating a training where participants feel relaxed and comfortable.
 - **Check dietary requirements** and try and accommodate where possible.
 - **Make sure it's on time.** It's important that food is on time, as otherwise this can derail your training schedule. Try and make sure the meal is not too heavy (though do make sure there's enough!).
 - **Must-haves:** coffee, tea, water. It's good if these are ongoing, and available at all times.
 - **General snacks:** Best is to have light snacks, and include fruit and nuts.
 - **Morning snacks:** If the training runs over a day or more, ideally there should be something there in the morning (fruit, nuts, crackers) for anyone who missed breakfast.
- **Basic facilities.** Don't forget to pay attention to the basics! Make sure there's enough toilet paper, running water, etc.

3. Planning your training agenda

Before designing a training, you need to find out what your participants' needs are. It's useful to a two-fold assessment focused on both needs and practicalities.

3.1 Conducting a training needs assessment

- **Determine capacities and gaps.** A training needs assessment should focus on what participants already know or already can do, and what their knowledge or skills gaps and needs are.
- **Take context into account .** The training needs assessment will differ depending on the focus of the training. A training with a digital-security / privacy focus, for example, might include questions to determine things like:
 - level of familiarity with computer and mobile phone terminologies;
 - level of familiarity in the use, configuration and trouble-shooting of computers and mobile phones;
 - what applications and online services participants currently use; and
 - a short risk assessment.

3.2 Conducting a practical needs assessment

A **practical needs assessment** can be used to determine things like:

- how much time participants have for preparation before the training starts;
- how much time they might need in the training schedule itself to attend to outside demands;
- what their general style of learning is.

Questions can include things like:

- Are you able to read x-y pages of preparation beforehand? If not, how much preparation are you able to do?
- Are you fully detached from your other work or will you need to do a few small things while in the training?
- Do you tend to learn better through reading or listening?

3.3 Pre-training activities

The answers to your practical needs assessments should inform how you design your training, and should also help with developing pre-training activities. If participants have time, it's often helpful to send some documents to read beforehand. These can include:

- The training agenda
- Readings on topics related to the agenda
- Participant guidelines.

Also remember to take into account your general participant profiles: language, age, gender, etc.

3.4 Timing and Schedules

For trainings that run for half a day or longer:

- **Start early.** The starting time should be 30 minutes before the work actually starts. This gives time for people to chat, have coffee, acclimatise to the space and to the work that's going to happen, and accommodates anyone who is running late.
- **Schedule a maximum 6 hours of training time.** Trainings are interactive and collaborative - this takes effort and focus. Try and not push the learning part of the day beyond 6 hours, as anything beyond this will tend not to be effective. Ideally make the lunch break longer (2 hours), so that people also have an opportunity to catch up on work or have a walk or a bit of downtime after lunch.
- When it comes to content, choose intensity over volume!

Example schedule:

9:30	Start
10:00-13:00	Work (with at least one tea break of 20-30 minutes in the middle). This gives time for two sessions of 1h15.
13:00-15:00	Lunch break
15:00-18:00	Work (with 20-30 minute tea break in the middle). This gives time for another two sessions of 1h15.

This can all be negotiated with participants, but be careful of forcing "consensus" about things like breaks as people might not speak up that they would like more break time.

3.5 Designing individual sessions

When you're designing individual sessions, make sure that each session is designed to fit into the time allocated, including wrap-up and questions at the end. It's important to start and end on time, and to honour the scheduled breaks.

Designing sessions using ADIDS

- **Structure:** The ADIDS approach provides a good framework for structuring a learning session, dividing it into five sections (Activity / Discussion / Input / Deepening / Synthesis), each of which flows logically from the one before.
- **Length:** These sections might be short and fit into a single session, or they might be more involved and be done over multiple sessions.
- **More information:** The Level-Up project provides a detailed explanation on how to use ADIDS in your session planning: <https://level-up.cc/before-an-event/preparing-sessions-using-adids/#preparing-sessions-with-adids>

4. Running a Training

4.1 Beginnings

The start of a workshop/training is really important, as this is when the tone is set, expectations are laid out, and rapport is created.

- **Be early.** Be at the training venue early so you can welcome participants into the space. Chatting to them as they come in helps create a relaxed atmosphere, and also gives you a sense of where they're at before you start the training.
- **Make sure everyone has a chance to speak** right at the beginning of the training. This can be done through a go-round that asks participants to introduce themselves to each other (if this has not happened already), and answer a specific question. This go-round can be used to gauge expectations: "Why did you come to this specific session? / What do you hope to learn today?"
- **Address expectations.** Once you've got a sense of participants' expectations, make sure you address them by letting everyone know what the session will and won't cover. For things

that participants want to learn but which will not be covered in the training, let them know where they can find these things out - either after the training is over, or in another workshop on offer.

- **Communicate the training parameters.** Don't forget to communicate the parameters of your time together: how much time you've got, the goals of the training, and the basics of what will be done.
- **Shared agreements.** Lay down a basic set of "shared agreements" about your time together as a group. This can include things like "For n participants, each person should try and speak one nth of the time"; no mobile phones; no photographs without consent; etc. If the training is short, this can be laid out quite quickly; if it's a longer training, it can be done as a group.

4.2 Endings

- **Questions:** Allow time for questions and to clear up anything that's not clear.
- **Wrap-up:** It's a good idea to wrap up the session at the end, summing up what's been done. This should ideally map onto the goals set out for the workshop at the beginning of the session! It's also good to check in with participants on what they've taken away from the session.
- **Give tips for further learning:** Try and always give pointers to resources or ways in which participants can continue their learning by themselves.
- **Evaluation:** Evaluations are an important part of any training, as they can help you to see what works and what might need to be changed. Make sure to allocate a few minutes for this, either at the end of each session or, for a longer training, at the end of each day. Evaluations can be done in a number of ways. Two simple options are:
 - **Plus/Delta:** For each session done, stick up a piece of paper with two columns: Plus (what worked?) and Delta (what could be changed?). Participant comments can be written on sticky notes and stuck under the relevant column.
 - **Evaluation forms:** Prepare a basic evaluation form beforehand and print out one copy for each participant. Questions can include things like:
 - What worked?
 - What could be done differently next time?
 - What did you learn that was new?
 - What will you take with you into the future?
 - Etc
- **Follow-up:** If possible, make yourself available for informal follow-up questions afterwards - this could be moved to a more informal space.

5. Facilitation

5.1 General points to keep in mind

- **Honour participant's own words.** Avoid listening to someone and then responding with "I think what you mean to say is..." or "I'll summarise what you said as..." and use your own

interpretation (though of course rephrasing can be useful if you're just using it to check your own understanding!).

- **Encourage participation.**
- **Be comfortable with silence.** People often need time to think and process information. Avoid the temptation to fill silences with more talk!
- **Avoid dependence.** The group can work without you and it should be your goal to enable them to eventually operate without a facilitator.
- **Set the context for the meeting:** Let people know at the beginning why they are there, what they will be doing, why it's important and when it will be finished.
- **Create a welcoming space.** The space people work in matters. Move the furniture if needed. Make sure people are comfortable and able to move around. A welcoming space is not just physical, it's also about the way you engage with the group, building rapport and trust.
- **Take care when it comes to timing and pace.** Be aware of the time. Make sure you finish on time. Adjust as necessary to do this. Be aware of people's energy levels and vary the pace. Sometimes it's important to speed up, sometimes it's important to slow down.
- **Give clear instructions.** Try and make sure your instructions are as clear as possible, and don't give too many instructions at once! Concentrate on one task at a time, moving on to feedback or the next instruction when a task is done.
- **Give time indications.** Say how much time there is for the task you're setting. Also give participants an indication when they've got a minute or two minutes left on a task, so they can start wrapping up.
- **Instructions first!** If you're giving out handouts or cards, it can help to give the instruction before you hand these out, while everyone's attention is still focused on you.
- **Reporting back to the group?** If participants are going to be reporting back to the group afterwards, remember to let them know this before they begin the task.
- **Be clear about the *why*.** With each task, try and say *why* it is being done. What's the point? This does not need to be elaborate - a couple of words putting the exercise in context can be enough.

5.2 Self care

Take care of yourself. Accept your own limitations before managing the expectations of others. It's hard work facilitating; it's tiring, and it takes a lot of effort to hold a group of people as they explore issues or struggle with ideas or decisions. Be self-aware: know when you need a break, or what helps you in your own self-care.

5.3 Practice

Facilitating is a practice art. You can't learn it from a book, or from a single "How-to" session. So get out there and practise! And have fun!