

15

A brief guide to training in participatory methods in the workshop

This section of the Notes provides training materials for participatory learning, exploring a different theme in each issue¹. The exercises described in this article provide a range of examples of how to train in participatory methods in a workshop setting. Many of them evolved through individuals making adaptations to fit their own needs and contexts. So do adapt those presented here to meet your own particular training requirements. Even better, invent your own and find your own way of doing things. All training in participatory methods should cover three basic groups of methods: Semi-structured interviewing, diagramming and visualisations, and ranking and scoring methods. Each of these is described below.

• Biases and behaviour

The vital ingredients for success however, are not the method themselves, but the attitudes and behaviour of those who use them. Accepting and valuing other knowledges will be difficult at first. Where extension workers are used to believing that they have the 'correct' message to teach, now they must learn what it is people need before making suggestions. Where scientists are used to believing that they have higher status because they possess 'better' knowledge, now they must be open to learning from local people as well as colleagues from other disciplines.

These changes imply significant shifts in the way participants are used to thinking and behaving. This is a critical component to address in any training course. At first, participants may be sceptical of the approach,

¹ Taken from a *Trainers Guide for Participatory Learning and Action*. Published by IIED. Price £18.95, plus p&p (25% UK and Europe, 35% airmail). See inside cover for details on how to order publications.

but through practice they will learn what is needed to make it work effectively. They will still, however, need to be encouraged to reflect upon their own attitudes towards other people's knowledge. This is essential if participants are to consciously seek to involve those who are often ignored, such as the poor, women and the very young and very old. Suggestions for topics to cover in a training session on attitudes and behaviour are shown in Box 1.

BOX 1

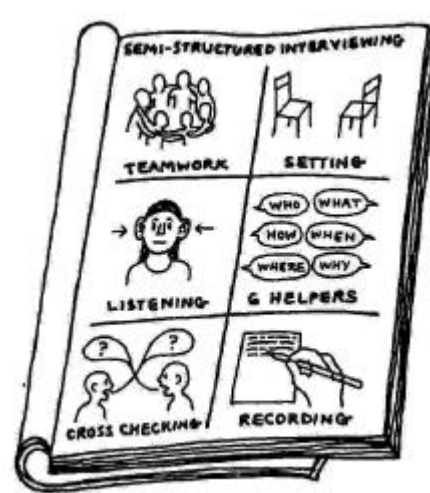
CHECKLIST: TRAINING IN ATTITUDES AND BEHAVIOUR

- buzz sessions to identify differences between our knowledge and local people's knowledges
- discussion on 'rural development tourism' and biases - when outsiders visit rural areas, which places they tend to visit, who they tend to talk to and why they get there, how long they tend to stay
- buzz sessions on how to offset biases in fieldwork
- 'do-it-yourself' (DIY) sessions in the village - being taught local activities by villagers
- using video playback of images of fieldwork facilitated by trainees to see behaviour and correct immediately
- team contracts, shoulder tapping

• Semi-structured interviewing

At the heart of all good participatory research and development lies sensitive interviewing. Without it, no matter what other methods you use, the discussion will yield poor information and limited understanding. Semi-structured interviewing can be defined as: "Guided conversation in which only the topics are predetermined and new questions or insights arise as a result of the discussion and visualised analyses". Although semi-structured interviewing is the most essential skill for

participatory methods, it is also the most difficult method to master and the most difficult to train others in. Good interviewing skills will only come with plenty of practice and constructive feedback from colleagues. There are seven core components to semi-structured interviewing which need to be addressed in training: team preparation, interview context, sensitive listening, judging responses, recording the interview, and self-critical review. Each aspect can be emphasised through the use of a range of workshop exercises. Many of these have been described in previous 'Tips for Trainers' within PLA Notes and are described more fully in the Trainer's Guide (see Chapter 5).



To help the trainees remember the key points of semi-structured interviewing, you can discuss with them its core elements (Box 2). Instead of providing them with this list, you may want them to discuss in small groups and afterwards add any items on the list that they may have or missed. There are many ways to design a semi-structured interviewing training session. Try and use a range of buzz sessions, plenary discussions, role plays and small group exercises and allow plenty of time - training in sensitive interviewing will require at least half a day.

BOX 2
TEN POINTS FOR SENSITIVE INTERVIEWING

1. Prepare as a team and agree a team contract
2. Use a checklist or interview guide
3. Be sensitive and respectful to everyone involved
4. Use visualisation methods to enhance participation and dialogue
5. Listen and learn
6. Ask open-ended questions using the six helpers (Who? What? Why? Where? When? How?)
7. Probe responses carefully
8. Judge responses (separate facts, opinions, rumour)
9. Verify through triangulation (cross-checking)
10. Record responses and observations fully.

• Diagrams and visualisations

Many of the recent innovations in participatory approaches have involved a shift from verbally-oriented methods (formal interviews and written assessments) to visually-oriented ones (participatory diagrams and visualisations). Everyone has an inherent ability for visual literacy, and the impact of visual methods on communication and analysis can be profound.

There are many different diagram and visualisations, including resource maps, social maps, mobility maps, transects, timelines, seasonal calendars, crop biographies etc.. As with most participatory methods, the best approach to training is *learning by doing*. Participants will learn quickest and be better able to apply the key lessons to their own work situations if they try the method first hand. This is best accomplished by setting up exercises in which they can practise themselves and/or analyse diagrams produced in different settings.

This experiential learning can be done in the workshop so that participants have adequate practice before visiting the field. No amount of workshop experience, however, can substitute for observing local people creating their own diagrams. You should emphasise the switch that the participants will need to make to 'hand over the stick' in the field and help local people conduct their own analyses using visual methods.

From the verbal to the visual

There are important contrasts between visual and verbal modes of communication (see Table 1). In the training session, it is important that you discuss these differences so that the trainees will understand the importance of trying out different forms of communication. Although you can do this before an exercise, you might find that comparing visual and verbal communication will be more meaningful if it is carried out as part of the debriefing after one or more visual exercises.

Table 1. Examples of differences between the verbal and the visual

Comparing the verbal and the visual	Verbal (interview, conversation)	Visual (diagram, model, drama, play)
Investigator's mode and role	Probing	Facilitator and analyst
Local person's mode and role	Reactive respondent	Creative analyst and presenter
Aim	Extraction of information	Generating local analysis
Degree of eye contact	High	Low
Medium and materials chosen by	Investigators	Local people
Ownership of information	Appropriated by investigators	Shared, can be owned by local people

Debriefing after diagramming

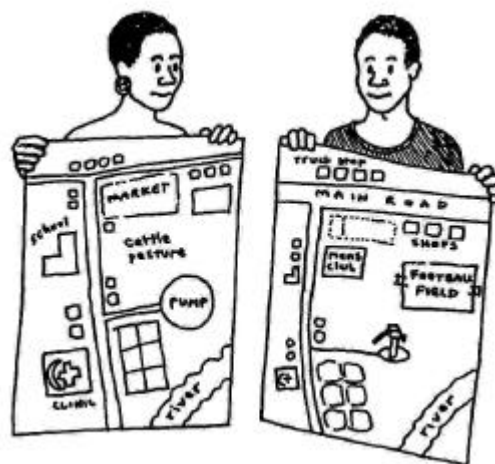
Many new issues will arise during these exercises on participatory diagramming and participants will need time to consider them. The value of good debriefing sessions cannot be overstated. It is always better to stop exercises early, even if trainees have not finished the diagram, to ensure adequate time for reflection and discussion. In training, remember the point is not to create the perfect diagram, but to consider the potential applications and limitations of the methods.

During the debriefing, you might want to ask some of the following questions:

- What did this exercise tell you about your own perceptions?
- How well did your team members work in your group?
- Did people hand over the pen or the stick, or did certain people dominate?
- How well were you able to integrate conflicting ideas into the diagram?
- How much time is required for a useful visualisation?
- If you were working with local people, how would the process have been different?

Guidelines for diagrams

The purpose of the workshop training is to prepare participants for using participatory approaches in the real world. At the end of every major workshop session on diagramming, you can help by encouraging participants to consider the implications of using these methods in the field. Encourage the participants to think about four important phases of diagramming in the field: preparation, getting started, during and after.



Ranking and scoring exercises

Ranking and scoring methods can be used to explore people's perceptions, elicit their criteria and understand their choices regarding a wide range of subjects, from resource allocation to wealth and well-being assessment. While many exercises can be carried out in a workshop setting or in the field, preference or pairwise ranking, matrix scoring, and wealth and well-being analysis are some of the most common methods.

With these methods, as with all visual methods, it is important that you remind participants that it is not the final matrix that is important, but the discussion that occurs as it is being created and the knowledge is shared. It is as common to talk of “interviewing the matrix” as it is to talk of “interviewing the farmer”. In short, it is not the final product, but the process involved in creating it that counts. To be truly beneficial, that process must inevitably include sensitive and perceptive interviewing, whether people are using visual techniques or not.

In the workshop setting, methods should be used to help illustrate the diverse range of perceptions of the trainees themselves. This can reveal how participatory development can be strengthened by bringing these different perspectives and insights to bear on a particular issue.

As with most methods, practice in the workshop is necessary before they are used in the field. Ranking and scoring exercises are amongst the more difficult, yet most powerful participatory methods available. Practising them first is essential to help clear up methodological questions. A well-planned practical session will provide the participants with a solid understanding of the main issues and applications of these methods, and give them more confidence to use them in their fieldwork.

Method	1	2	3	4	5
Ranking	X				X
Scoring		X	X		
Diagramming				X	X
Interviewing	X	X	X	X	X
Grouping				X	X
Other				X	X



TRAINERS' CHECKLIST: PARTICIPATORY METHODS IN THE WORKSHOP

- Have you planned your programme to include sessions on semi-structured interviewing, diagramming, and ranking and scoring.
- Have you included exercises or discussions that address each of the seven components of semi-structured interviewing?
- Have you planned the use of exercises so as to limit the use of lecturing?
- Have you thought through the sequencing of different training methods on one topic so that they build on each other?
- Have you decided which exercises might be dropped from the planned schedule if an exercise takes longer than planned?
- Have you decided how many and what size groups of trainees will be need for each exercise?
- Have you decided how sub-groups will be formed for each exercise?
- Have you allowed sufficient time in the programme for feedback?
- Have you prepared any hand-outs on methods, guidelines, etc. that you might need?
- Have you prepared your debriefing questions for each session?

Next issue: The challenges of training in the field.