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A brief guide to organising workshops for training, orientation and exposure in participatory approaches

This section of the *Notes* provides training materials for participatory learning, exploring a different theme in each issue¹. The previous nine issues of *PLA Notes* have covered most of the elements for a training programme in the 'A brief guide to..' section. But these need to be combined to meet the specific needs of the institution and participants for whom the programme is being run. This tenth and final part of the Trainer's Guide serialisation describes how training needs analysis, combined with in-depth institutional analysis can help design a training programme. This is followed by suggestions for logistical arrangements, planning the course content and structure, and evaluations and revisions for the future.

• Types of training workshop

There are several different types of courses that can be used for training in participatory approaches. Each has different objectives and it is critical not to confuse them. The clearer that you, as a trainer, are about the training objectives, the clearer the participants will be about what they should have learnt. Each requires careful design and a different approach to preparation and follow-up.

Types of training courses include the following, which are not mutually exclusive and can be used in sequence as part of a training strategy:

¹ Taken from *A Trainer's Guide for Participatory Learning and Action*. Published by IIED. Price £18.95, plus p&p (20% UK, 25% Europe, Rest of world 40% airmail or 25% surface). See inside cover for details on how to order publications. Alternatively, compile the section 'A brief guide to..' from each of the last ten issues of *PLA Notes* (numbers 26 - 35) to have a summarised version of the Trainer's Guide.

- *Lecture/series of sessions*: A series of one to two-hour lectures or sessions spread over a term, such as in college, university or any training institute.
- *Brief exposure/orientation*: A brief half to one-day session, where participants are exposed to a range of methods, achievements and methodological issues. There may be time to practise one or two methods. If this is their first exposure to participatory approaches, then the participants are not likely to be effective practitioners at the end. However, they should know enough to want to explore the methods and principles further, perhaps even trying them out on a limited scale. It should be emphasised that this does not constitute a full 'training' in the methods.
- *Longer exposure/orientation*: A short two to five-day course, where participants can gain a good grasp of basic principles, core concepts and basic methods, but will not necessarily be in a position to be strong practitioners. Participants have the opportunity to reflect on the methods and processes, and so can make adaptations to their own needs. The course can have a focus on training methodologies if the aim is to train trainers.
- *Field-based training*: This type of course can take 7-14 days, and includes a significant field component. It aims to expose participants to a range of methods and allows them to test and evaluate them in a field setting. Participants can be expected to develop reasonable field proficiency in methods, principles, and necessary behaviour and attitudes.
- *Training of trainers*: This requires more time and extended exposure. Working together with experienced trainers is one of the most effective ways of learning. Field-based training of trainer courses are possible if all the participants have had prior experience as practitioners with the

methods and the theory of participatory approaches to development.



Different types of courses may be appropriate for different groups of people. Exposure courses may be appropriate for relatively senior personnel who are unlikely to use the approach in the field, but need to know its purpose to encourage its use. Field-based training is appropriate for field practitioners who are likely to use a participatory approach in their work. Training of trainers is appropriate for seasoned practitioners, or for those with a specific staff development role.

• **Assessing training needs**

The impact of a training event will depend largely on its institutional and organisational context. The general objective of a course in participatory approaches is to establish a learning approach that encourages self-development. But this may conflict with the culture and structure of the organisations involved in the course or workshop.

Institutional constraints must be borne in mind during the planning and execution of the course (see Box 1). Before training begins, the most important step is for you to find a way of understanding the training needs of the relevant institutions and individuals, and the constraints present in the particular institutional setting.

Although it might be a tempting option, a pre-designed training programme is rarely going to fit the specific needs of a new organisation or group of trainees. The best way to adapt and finely-tune a programme is to find out as much as you can about the institutional context beforehand. Box 2 outlines some of the major steps required in the training needs analysis. This can be conducted by a small group within the organisation, or in a comprehensive fashion with all staff involved.

In practice, trainers are often called in after an organisation has already analysed its own needs. The training needs analysis might have been conducted in a participatory manner or decided upon by a single person. Try to find out who made the analysis and how. You will have to use this as the basis for planning your training session and strategy.

BOX 1

COMMON INSTITUTIONAL CONSTRAINTS

- Institutions are frequently organised on authoritarian rather than participatory management styles;
- Management positions are often held on the basis of seniority or research ability rather than management skills;
- Creative innovation is rarely tolerated;
- Institutional learning is difficult with a rapid turnover of staff;
- Staff development is frequently in the form of refresher training where new facts are transmitted, rather than personal development encouraged;
- Status divisions may be rigidly followed e.g. researcher versus extension worker, limiting the sharing of perspectives and generation of new ideas;
- Group work is frequently only seen in terms of meetings that actually stifle innovation rather than enhance it;
- Participatory approaches are seen as too challenging and demanding in terms of personal commitment;
- Institutional focus is on product, measurable results, rather than process, the manner and means of achieving those results;
- Lack of training to strengthen capacity leads to disillusionment and frustration of those organisations keen to use the new approaches more widely.

Sources: Ison (1990) and Thompson (1995)

BOX 2
**STEPS IN PARTICIPATORY TRAINING
NEEDS ANALYSIS**

1. Clarify staff job descriptions, analysing the overall duties and the specific tasks related to the job.
2. Ask postholders to:
 - formulate suggestions for improving their job descriptions;
 - identify their own knowledge (and gaps in their knowledge) about, attitudes towards and skills in participatory development approaches;
 - identify organisational constraints related to use of participatory approaches and ways to minimise them.
3. Together determine priorities in training needs to fill gaps and in ways to overcome key organisational constraints.

Source: Zeneta Peixoto Franca, pers.comm.

But it is still essential to build up your own assessment through observation and discussion. You might want to conduct some semi-structured interviews with diverse groups, such as managers, drivers, and secretaries. You could consider a transect walk through buildings and speaking with those you meet. Try to read as much secondary data as possible, e.g. reports, past training reviews, written policies, personnel evaluations, etc.. The more information and opinions gathered, the easier you will find it to design a course to meet those particular needs. Ask yourself six basic questions (see Box 3).

BOX 3
**BASIC QUESTIONS FOR PLANNING
OF TRAINING**

- What is the 'problem' to be addressed by training?
- How did this come about?
- Will training be (part of) the answer?
- What do I need to do to make this workshop successful?
- How will I know if success is realised?
- How does this workshop fit in with a Training Strategy?



The most important information for you will be the participants' expectations. Expectations and objectives for the course, should, ideally match closely. It is also important to establish some dialogue with the participants as early on as possible. Let participants have materials to read before the workshop, and let them know what to expect.

Find out if and why there may be resistance. If possible, ensure that senior staff in the institution are committed not only to letting the course happen, but also to it having a lasting effect.

Ideally, you should include a session during the training course to discuss what the institutional implications would be of the change in practice to a more participatory style. Even during a one-day course, a quick brainstorm session at the end of the day would be helpful in two ways. First it will make the participants appreciate that participatory approaches are not a toolbox but actually have far-reaching implications for ways of working. Second, a brainstorm will help deal with unspoken concerns that some participants will have about how this fits in with their everyday lives. By asking them to reflect on what obstacles they expect when they return to their desks, it draws their minds out of training context and back to reality.

After the training needs analysis and discussions with key individuals, you will need to determine the objectives for the training. These will include your objectives as a trainer, the objectives of the participants, and the objectives of the institution at large. Where possible, try to formulate objectives which summarise your expectations about the benefits of the training course. This will make monitoring and evaluation of the learning

impact more clear for yourself, the participants and other key staff after the event.

• **Logistical arrangements**

To ensure a smooth and continuous learning process, the basic arrangements should be thoroughly organised in advance. Logistical arrangements will have to be organised for four aspects of the training: the learning group, facilities and accommodation, field sites and transport, and documentation and follow-up. Remember that thinking through these issues beforehand can save you many headaches during the workshop and lay the basis of an effective training course.

The learning group

It is important to think carefully about the participants.

- How many trainees? And what mix?
- What should the training focus be?
- When will participants know about the course?
- Will translators be needed?

Facilities and accommodation

Think through where the workshop will take place.

- What will the workshop or classroom facilities be like?
- What arrangements need to be made for accommodation and food during the workshop?

Field sites and transport

If the training involves work in the field, it is important to ensure that all the arrangements have been made for this to run smoothly.

- How will the sites be selected and how will local people be informed?
- What transport will be needed for the fieldwork?

Documentation and follow-up

Think through the arrangements for report writing. There are many different kinds of

documented outputs that could come from a workshop, including:

- materials for use by the participants during and after the workshop;
- reports for the client/donor/commissioning organisation;
- case study material from the villages;
- action plans;
- summaries to senior officials; and,
- methodological notes for other trainers and practitioners.

• **Planning the content and structure**

Design considerations

Having decided upon the objectives and thought through the logistics, the next stage is to plan the content of the course. Begin by listing the key points you wish to cover, aiming to keep the material as relevant to the working environment of the participants as possible. Divide these into what the trainees *Must Know*, *Should Know*, and *Could Know*. Build your plan around the first of these, and add the others later. Indicate the objectives of the training and the benefits for the trainees.

Now consider how you are going to achieve these objectives. Select your sequence of presentations, exercises, games and reviews, and give them appropriate timings (see *PLA Notes 27*). Plan in such a way that trainees can make small sequential steps in learning. Build on each step by demonstrating and having the trainees practice or analyse. Observe and correct errors; allow them to discover the benefits and shortcomings of the new skills they are learning for themselves. Attitudinal change usually follows behavioural change, and so exercises and practice are essential to encourage long term attitude change. Important design considerations include the following:

- Only plan what can be planned;
- Don't plan further ahead than what can be overseen;
- Plan as much as possible with the involvement of the participants;
- Move from the general to the particular and then back to the general;

- Stay close to reality; and,
- Always consider participants' energy levels.

• Evaluations and revisions

When it is all over for the participants, you as a trainer still have more to do. Don't relax until you have conducted an evaluation of the programme, and worked out where you would change things in the light of new experience. Use evaluation exercises to learn from the participants. Some of their comments will seem reasonable and fair, others may appear entirely unfair to you. All are useful, as they give you an indication of changing perceptions of the trainees. Later you may be able to evaluate the success of the programme by observing longer term changes in attitude or through corresponding afterwards with participants or senior staff.

Evaluating participants' reactions is a relatively easy part of evaluation. However, this immediate type of assessment is not a good indicator for judging long term learning impact. It is more difficult to assess the impact of training in terms of changed behaviour, subsequent on-the-job performance, and organisational change. By assessing changed behaviour of the learning group during the classroom and field session, you can find out not only what participants feel, think or believe as a result of the training, but what they now do differently.

Assessing changed behaviour can be accomplished by judging the way trainees fulfil any assignments given in the training setting, from case study analysis, to documentation, to interaction with local women and men. If you ask them to write up action plans, this will tell you about the extent to which they have internalised the training and how committed they are to continuing with what they have learnt. Another way is to assess before and after attitudes.

What you assess in terms of changed behaviour only gives an indication of how this new learning may influence working modes. Assessing the impact on actual job performance will need to be carried out by the trainees themselves and their superiors.

Monitoring the implementation of the action plans is one relatively easy way to judge this.



TRAINERS' CHECKLIST: ORGANISING WORKSHOPS

- Do you understand thoroughly what objective your training is expected to achieve?
- Do you understand which institutional constraints might make the training ineffective?
- Do you know the backgrounds of the participants?
- Do you know what they are expecting to learn in the workshop?
- Have you ensured that proper arrangements are made for the facilities and accommodation during the workshop?
- Have field sites been chosen with the agreement of local people?
- Are you clear about the type of documentation which is expected at the end of the workshop?
- Have you carefully planned the type and timing of evaluation as part of the training?
- Have you tried to fulfil as many conditions for sustained impact of the training as possible?

Training is only one of many components that shape and influence the organisational learning process. For it to have a lasting impact, training in participatory approaches must be part of a wider programme of human resource development. It will not only need to focus on preparing staff to use certain field methods, but will also need to improve their communication and analytical skills. It will need to encourage a relaxed and open learning environment in which staff from different levels in the institutional hierarchy can work

together constructively. Finally, it will have to remain flexible to new ideas and procedures, and adapt to changing conditions within the institution and outside it.