TUTOR'S MANUAL

training skills for women

Commonwealth Secretariat

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TRAINING SKILLS FOR WOMEN

Commonwealth Secretariat, Marlborough House,
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TUTOR'S MANUAL: TRAINING SKILLS

The role of a trainer is crucial in any development activity which aims to improve the living conditions of poor people. A key target in raising the living standards of any community will be the women, who, in most developing countries, are the main providers of food. Education and training techniques will be essential aids in building self-reliance and self-sufficiency within families and communities.

The trainer's role as an agent of change is therefore important.

This manual is designed to focus trainers' awareness of and ability to analyse their own strengths and weaknesses, and to build their competence to influence and encourage the trainees with whom they work to adapt and use the skills they are teaching.

The materials in this manual have been tested and refined over three regional workshops, and also include segments of influence skills training developed in a previous series of workshops.

We hope that trainers in any field will find this manual valuable, and can incorporate the material in their training programmes.

Printed and published by
The Commonwealth Secretariat

May be purchased from
Commonwealth Secretariat Publications
Marlborough House
London SW1Y 5HX

ISBN 0 85092 253 4

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BACKGROUND

PART I - BACKGROUND

This training manual for training skills was compiled in response to requests from Commonwealth governments for a course for women trainers, at an earlier series of regional workshops on influence skills for women in national machineries and non-governmental organisations.

The material was prepared by the Commonwealth Secretariat with the assistance of Lee Bryce, a London-based management training consultant. It was used in a series of three regional workshops for women trainers organised by the Women and Development Programme of the Commonwealth Secretariat, and funded by the Commonwealth Fund for Technical Co-operation.

In the belief that all training must be placed in a socio-political perspective and that the goals of the training programme must be clearly defined, the Programme began each training course with a session looking at the issues raised by various conferences on women and development, and examining the relevance of such issues to training as a politicising and awareness-building method.

Equally important in training courses for women <u>and</u> men are the "ice-breaking" exercises which were used in all courses to generate a relaxed, trustful atmosphere and supportive attitudes among participants.

The sessions in this training manual can be used or adapted to suit many different training needs. They are not necessarily intended to be used in the order in which we have printed them or even in this combination. As every experienced trainer knows, flexibility is essential in organising and running any training activity.

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TRAINING NOTES

PART II - TRAINING NOTES

1. Contents of manual

The components of this manual include a step-by-step analysis and development of the skills required by trainers in devising a training course or programme. The manual also contains several sessions aimed at building influence skills and self-awareness, both for trainers themselves and for the trainees they will work with. Trainers can use the material either as a complete course or as segments in other courses. We hope the material will also be adapted for use in many different situations.

2. Tutor/participant ratio

The training course run by the Women and Development Programme required one tutor to every four or five trainees. For many countries, this ratio may be difficult to arrange, and trainers will have to work around the role-play exercises which must have a ratio of one tutor to four trainees to be truly effective.

If you are able to run a training course with several tutors, one of the tutors will normally be the course director who is responsible for the workshop and introduces the first working sessions. If the tutors can work as a team with different tutors taking responsibility for the sessions they feel most comfortable with, the trainees will benefit from the changing faces and styles, and will gain an appreciation of different techniques and skills.

3. Tutor's meetings

The team of trainers involved in a training of trainers course should meet before the workshop starts to work through the proposed agenda and familiarise themselves with the contents and with one another as colleagues. Where you are using the influence skills segments, a practice run through one or more of the sessions is highly recommended. This will put all the trainers at ease with the role-play method.

Tutors should always meet at least once a day during the workshop to share experiences and feedback on their work in different groups so that problems can be resolved, support given and the programme revised if necessary. Try to hold the meetings at times that suit all the tutors (i.e. not when they are very tired, or in the evening if some tutors are not resident).

4. Timing and flexibility

Experience in three training workshops using the materials in this manual has shown that each session requires at least the times given in the duration columns for a group of four or five trainees to benefit fully.

Timekeeping is a very important part of the tutor/course director's job, and all participants, trainers and trainees, should be asked to try to be ready to start each session on time. An important way of ensuring that small working groups in a course keep approximately the same pace of work is to have the same number of people in each group, and to spread participants with language or other difficulties which may slow groupwork evenly throughout the groups. The participatory approach of this type of training means that flexibility is essential, however, and you will need to warn participants that the timetable may need to be revised from time to time.

5. Learning reviews

If you are running a workshop/course of more than three days, you may find the inclusion of learning reviews useful. In all our Women and Development workshops, we included regular learning reviews initially at the end of each day, and then every second day. At the beginning of each day we had a brief report from each of the groups on their learning review of the day before. This proved a very valuable mechanism, both in helping participants to review what they had done each day and to place it in perspective, and in starting each day with a brief recap on the previous day's work. It was also a means of ensuring that any problems or queries which arose were aired and dealt with by tutors and participants.

6. Materials and documents

The papers which accompany the training notes for each session in this manual are for background reading. Given the multiple sessions in this type of course, it is important to provide each trainee with a set of reference documents which cover the substance of the workshop. Do not issue any papers other than the relevant ones to the session you are working on, and preferably, unless you want the trainees to read them first and work on them, give them out at the end of the session, in order to avoid losing half your audience as they read the paper instead of attending.

7. Visual aids

Although some visual aids are mentioned in this manual, they are not essential. We have run workshops with only flipcharts, blackboards, chalk and pens as visual aids. If you have no paper or pens, use a stick on the ground. It is the people who matter in these exercises, not the technology.

Having said that, if you have access to projectors or other visual aids, be sure to have a rehearsal before you use either in the training room.

8. Preparation for workshop

Participants coming to the workshop or training course should be asked to bring with them brief information in written form about their country/ organisation, and a copy of other relevant documents such as programme plans, project outlines and work objectives.

9. Introduction to the workshop

For any training session or meeting, the way the organisers start the first working session is very important in setting the tone of the whole meeting. You may have an official opening ceremony at which a national or local dignitary may address participants, or you may be working with a small group of women informally. The notes which follow form a checklist of items which you may find useful reminders for your opening remarks.

a) Welcome participants.

b) Introduce yourself/tutor(s)/other speakers.

c) Explain that the workshop will be a learning experience for everyone, including tutor(s).

d) Set the scene - explain the workshop/meeting's importance (first in a series, first ever in that place/on that topic).

e) Outline aims of the workshop - to make participants' work/impact more effective.

f) Mention cultural realities and the importance of tolerance - learning about each other and different homes/work experience/ countries all part of the course.

g) Ask if anyone has any hearing problems or other disabilities so that the group can help them. Emphasise your desire that those who may have a language problem (and there is always at least one) will not allow it to stop them participating fully.

h) Stress flexibility of the programme and the need for punctuality.

i) Explain transport and accommodation details and money.

j) Show yourself to be willing to help anyone with queries, problems, suggestions, etc.

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MANUAL

PART III - MANUAL

1. INTRODUCTORY EXERCISES

At the beginning of most meetings or workshops, participants usually feel nervous and perhaps apprehensive. If they are to work together, for several days (or even hours), they need encouragement to relax, get to know one another and start to build trust within the group.

With this aim, Women and Development begins every meeting it runs with some kind of "ice-breaking" exercises, and our experience of the effects of these exercises has been very positive.

This section of the Manual includes the basic exercises we have used. You will probably find most of them familiar, and there are other variations on these exercises which can be used also.

SHARING WORK EXPERIENCES

Objectives	Tutors: 1. To introduce members of the course to one another using a participatory method. 2. To provide an initial example of different styles of interviewing and presentation of results. 3. To "break the ice".	
Document	Notes of Interview.	
Time	1 hour 15 minutes	
Method	Interview in pairs. Two-minute presentation about the other person to the whole group.	
30 mins	Participants work in pairs, telling each other about their training work, identifying problems which they hope the workshop will help them to solve. Explain that after this they will be asked to give a two-minute presentation about the other person to the whole group, so they should make a note of the main points.	Tutors should leave the participants to get on with this on their own.
45 mins	Participants rejoin the whole group, and each pair member introduces the other's work and problems to the whole group. The course director chairs this session and keeps it to time.	
15 mins	Tea break.	

HOPES AND FEARS

Objectives	Tutors: 1. To clarify expectations of participants and to outline which expectations are realistic. 2. To enable participants to share their hopes and their fears. 3. To encourage participants to understand their roles and responsibilities and those of the tutors in the workshop. Participants: 1. To compile a list of hopes and fears about the workshop. 2. To question tutors about the programme.	
Documents	Flipcharts for each group's list of hopes and fears.	
Time	1 hour 10 minutes	
Method	Small group exercise. Whole group discussion.	
20 mins	Divide the workshop into small groups of up to 5 participants each. Ask each subgroup to share their hopes and expectations, and also their fears and concerns about the workshop, and to list these on newsprint (one sheet for each subgroup preferably). Tutors form a subgroup and do the same exercise.	The aim is to encourage participants to take responsibility for their own learning - and to show that the tutors' role is coaching, designing exercises, providing exercises, etc.
15 mins	Subgroups disband and post their newsprint lists on the walls. Everyone walks about and reads the newsprints from every group.	
35 mins	The course director leads an informal discussion with the whole workshop on the hopes and fears revealed by the exercise. The purpose of this discussion is to: - reduce anxieties by showing that they are shared;	Go through each group's sheet carefully.

- provide reassurance and dispel unnecessary concerns;
- show how the workshop plans to meet expectations;
- say which (if any) expectations will not be realised by this workshop;
- show that there will be some flexibility.

Keep it short and light so you don't raise the very anxieties you hope to dispel. Do not expect to dispel all anxieties - the emphasis is on sharing.

<u>CONTRACTING</u>

<table>
<tr><td><u>Objectives</u></td><td>Tutors:

1. To enable participants to contribute their needs as they see them for open discussion and decision.

2. To encourage a participatory atmosphere for the group.

3. To provide a realistic programme of work for the workshop.

Participants:

1. To establish in discussion with tutors the needs of the trainees from the workshop and to demonstrate willingness to learn and work with others.</td><td></td></tr>
<tr><td><u>Documents</u></td><td>Programme for workshop.
Record of blackboard results.</td><td></td></tr>
<tr><td><u>Time</u></td><td>30 minutes</td><td></td></tr>
<tr><td><u>Method</u></td><td>Whole group (plenary) discussion.
Small group exercise.

This is really a part of and a continuation of the hopes and fears exercise.</td><td></td></tr>
<tr><td></td><td>During the discussion on the hopes and fears revealed by the exercise the course director distributes the workshop programme and goes through it, answering any questions.

Divide the workshop into subgroups of about 5 participants and allocate a tutor to each. The process of contracting should be completed in these subgroups where the tutor should:

- explain that these subgroups will be together for much of the course, although there will be some mixing of groups later on so that all participants get to know one another.

- establish a subgroup contract for supportiveness, clear and honest feedback, and individuals being responsible for their own learning with help, backing and prodding from the rest of the subgroup.</td><td>List significant new suggestions on blackboard. Promise tutors will look into these suggestions. Then do so and report results to course later in programme.</td></tr>
</table>

2. TRAINING SESSIONS

The training of trainers course was developed with the aim of assisting trainers to develop and run their own training programmes. The content of the course starts with a session establishing the skills needed by a trainer, and continues with specific sessions aimed at building those skills. There is, therefore, a logical order for scheduling the training sessions which form the core of this programme.

For easy reference, we have printed the background papers for each session with the training notes. In most cases, these papers are intended to back up the working session, although in some cases the papers are used as a basis for the session.

Because we wanted the trainers' course to be practical and effective, we incorporated an individual project into the working sessions. At the beginning of the course we asked each trainee to plan and develop a specific course using the information she gained from each session. Each practical exercise was, therefore, linked to the trainee's own in-country work programme, and the results at the end of each course pointed to the effectiveness of this practical emphasis.

SKILLS NEEDED BY TRAINERS

Objectives	Tutors: 1. To identify the important skills, knowledge and attitudes that a trainer needs to have. 2. To encourage sharing of training experience within the group and the range and types of skills used by participants. 3. To introduce skills not currently used by the participants. 4. To reassure participants about the flexibility of the programme. Participants: 1. To compile a list of training skills. 2. To identify some of the gaps in skills and experience and establish learning goals.	
Documents	Flipcharts for small group lists. Paper: "Training Skills". Blackboard list of skills.	
Time	1 hour	
Method	Small group exercise. Plenary discussion to pool lists and establish priorities.	
20 mins	The initial work is done in subgroups (the same groups as on Day 1). In a discussion led by the tutor the groups list all the skills they think are needed for training.	Tutors may have to prompt the discussion into areas not spontaneously discussed by group - e.g. behavioural, practical, timing, artistic,etc.

15 mins	The subgroups rejoin the plenary session and the course director writes a list of skills on the blackboard in order of priority, taking one from each group in turn until all the points are on the board.	Pointers for using black-board: 1. Accept each group's points in <u>their</u> words. 2. Clarify by questioning. 3. Don't fab-ricate a point or add one that the groups haven't brought up. 4. Let the groups follow their points up.
25 mins	The course director leads a discussion on the skills identified - and discusses any skills not identified which the programme aims to teach. The main purpose of this discussion, however, is to reach an agreement about priorities.	

PAPER 1

TRAINING SKILLS

1. Understanding of principles of learning - i.e. the need for trainees to take responsibility for their own learning, and for flexibility to allow contracting.

2. Ability to communicate:

   Skills
   - speaking to groups
   - running discussion groups
   - chairing sessions (panels, etc.)
   - using audio-visual aids
   - preparation of materials, handbooks, etc.
   - ability to "draw out" participants.

   Attitudes
   - awareness of cultural differences
   - perception of participants' attitudes
   - openness to criticism
   - ability to "control" direction of session, to avoid lengthy speeches, red herrings, etc.
   - courtesy.

3. Administrative ability
   - arranging speakers and programmes
   - preparing materials for course (handouts)
   - bureaucratic requirements (incentives/travel/expenses)
   - writing papers for funding/training approvals
   - dealing with office staff on financial/clerical matters.

4. Public relations
   - selling the need for training
     within the employment/government hierarchy;
     to potential participants and their immediate bosses;
     to yourself;
   - speaking to other groups about training.

5. Knowledge
   - training methods
   - training aids
   - subject matter of sessions.

ASSESSING TRAINING NEEDS AND DESIGNING PROGRAMMES

Objectives	Tutors: 1. To build awareness of assessment techniques and their important effects on participants. 2. To enable participants to practise an assessment of training needs for their target group using the experience gained in their own previous exercise. 3. To encourage participants to make realistic assessments of training needs and timing for programmes. 4. To stress (by example!) the need for flexibility in training. Participants: 1. To demonstrate an ability to analyse training needs by listing tasks, knowledge and skills needed.
Documents	Paper 2: "Diagnosis of Training Needs". Paper 3: "Assessment of Training Needs".
Time	2 hours
Method	Short presentation of principles to whole group. Practical work individually in small groups.
20 mins	A short presentation to the whole group on the principles of assessment of training needs based on Paper 2, "Diagnosis of Training Needs", and Paper 3, "Assessment of Training Needs".

2-3 hrs	<u>Subgroup Exercise</u>	
	Tutors introduce exercise, explaining that each participant is going to be asked to assess the training needs of her subgroup and then get together to design a programme to meet these needs. The whole exercise will not be completed until the following day. The tutor then goes over the practical advice in the papers, answers questions and starts the practical work.	Make sure everyone has a go and give lots of guidance.
	<u>Stages of Assessment</u>	
	1. Interview individuals to establish their areas of work. 2. List the tasks, knowledge and skills established by these interviews. 3. Establish priorities for interviewers. This stage, to be done by each individual or pairs or threes, will probably take all afternoon. Each group should compile a summary of findings from each participant at the end.	There will be a lot of activity and confusion here, so the tutor should try to organise people into their interviews if there is too much chaos.

PAPER 2

DIAGNOSIS OF TRAINING NEEDS

The need for diagnosis

There is no universal rule for training people, no panacea that applies to all sets of circumstances. The approach adopted must depend on the company, the situation - present and projected - and on the individuals who are to be trained. Thus, as when treating a medical condition, a careful diagnosis must be made before the best treatment can be determined.

Too often a company or organisation decides that it will "go in for training" and sends people on courses with only slight regard either for the suitability of the course to the individual or for the benefit that will accrue to the company or organisation. If it is to be effective, the course of treatment must be carefully selected. It must suit the individual's condition; her capabilities and her needs; the place she occupies now and in the future in the organisation's structure. This diagnostic step is thus to establish who needs to be trained, why the training is needed and what form that training should take. The other questions such as "where", "when" and "how" then become relative points of routine and detail.

All levels should be considered when diagnosing training needs, because people at any level may need training.

The organisation's needs

The largest single factor which dictates the need for training and the diagnosis of these needs is the policy of the organisation or department. When it is clear what the organisation is trying to achieve, the skills that the individuals in the organisation need to help them promote the organisation's aims can then be ascertained. Thus such questions as the following must be answered before any profitable investigation can be made into the needs for training:

- what are the skills being used now?

- are there plans for work in new areas?

- are new skills or methods contemplated?

Training can be an expensive business, so it is imperative that the output justifies the financial input. The organisation's policy dictates the needs it will have for skills of various types.

In every organisation, there will be people at a variety of levels who would benefit from training, including managers, workers and instructors, and even education for villagers who work with these people must be thought about.

The training requirements for each will be different, both in quality and quantity. If the needs are analysed, the training can be outlined and responsibilities determined for completing it.

If people are trained for jobs that they do not have the resources to do, or trained to appreciate the benefits of techniques that they can't use, the most likely outcome will be frustration and waste of the training.

The individual's needs

Within the general structure of the organisation the particular needs for training will vary with the individual. How can these needs be worked out so that the individual welcomes the training programme which is set out for her? Too often her training is seen as being separate from her job - and too often this is true!

For each position in an organisation there are definite requirements which the skills of the individual in that position should match, whether this is a formal job specification or it is just general knowledge. The formal job specification, of course, makes the analysis of the individual's needs for that job much more direct. In some cases, a group of positions in a department may have similar requirements so that a training plan can be devised for the "average individual" and the particular facets which are required by the particular person can be determined and her training programme devised to include them.

How do we diagnose training needs?

We can assess training needs in two ways. We can

- ask people what training they feel they need;
- deduce their needs from their tasks and from how well their managers/supervisors say they do them.

Both approaches have flaws. The diagnosis is biassed by the assessor's subjective evaluation. There is a risk of confusing the need for knowledge and the need for practical skills. There is no means of measuring the "before and after" results of the training process.

The questionnaire is probably the method least likely to allow biases to occur, especially when it is designed carefully and filled in by potential trainees and their supervisors. The questionnaire should be used to establish the skills and knowledge that people see as desirable and should form the basis of programme design.

Training priorities

Part of the process of diagnosing training needs as the basis of planning a training programme will be the establishment of priorities for training. Types of training required will cover

- skills

- knowledge of policy, structures of organisation and important principles of communication

- techniques

- confidence in role.

PAPER 3

ASSESSMENT OF TRAINING NEEDS

POSITION	DUTIES AND TASKS	KNOWLEDGE	SKILLS	PERSONAL FACTORS

ASSESSING TRAINING NEEDS AND DESIGNING PROGRAMMES

Objectives

1. To demonstrate our ability to analyse training needs by compiling a list of them in order of priority.

2. To develop and write down a training programme to meet these training needs.

Document

Paper 4: "A Systematic Approach to Designing Training Programmes".

Time

2 hours 30 minutes

Method

Small group exercise on programme design. Informal sharing of results.

Participants continue to work in their subgroups. Group members share their results from Day 2's work in a way which includes everyone's findings.

They then move on to the final stage in which they design a programme to meet all the needs identified. The tutor guides them through the principles of programme design, drawing their attention to such things as:

logic
priorities
timing
enjoyment
keeping participants awake
appropriateness
length
variety
structure/lack of structure.

The tutor should play a low key role here and mainly intervene on request or on process issues and try not to get involved in the content, reserving content comments for the feedback session at the end.

The tutor then lets the group get on with the task and gives feedback on the final result. Subgroups post their results on walls of plenary room and walk about reading and discussing one another's results.

Very informal plenary sharing.

PAPER 4

A SYSTEMATIC APPROACH TO DESIGNING TRAINING PROGRAMMES

1. Identify and assess the group's needs for planned training

Determine: a) for which jobs/roles (or groups of members), and

b) for how many people

planned training is or will be required, both now and in the future, in order to arrive at a training forecast, or estimate of total training "load".

Make use of information derived from:

a) surveys of needs conducted within the organisation;

b) responses to publicity for particular types of courses, e.g. requests;

c) plans for future activities;

d) effectiveness of members/officials in particular areas (use a training plan).

2. Determine the priorities for training in the light of:

a) available resources, internal and external (e.g. staff, premises, equipment);

b) current constraints (e.g. time and money available, number of trainees);

c) policy limitations imposed by union policy.

Ask: Where is planned training likely to bring the biggest and/or the quickest benefit in relation to efforts and costs? Where are the most critical areas?

Having looked at the needs attempt to determine what are essential skills/knowledge required and what is of lesser importance.

3. Analyse the jobs/roles of trainees (or activities of members) having a priority for training

Prepare a training profile - i.e. a list of tasks/activities the person has to carry out.

Beside each activity or task list the specific KNOWLEDGE, SKILLS or ATTITUDES required if the activities or tasks are to be really effectively carried out.

4. Specify the "trainee population"

Who is to be trained?

State the background, experience, knowledge, starting ability, length of membership, etc., expected of trainees. This helps to make sure that people undertake the training/education best suited to them.

5. Set precise training objectives

Set overall objectives for a training course, seminar or programme.

Set specific objectives for each section of the training.

State what trainees will be able to do when training is completed:

a) results expected (sometimes called "terminal behaviour");

b) standards required;

c) conditions to apply.

6. Select course content

The course content should be a series of statements or headings of what content the trainees must learn. This is indicated by the objectives (see 5).

7. Select training methods/trainers

Design a detailed programme. Cover these points:

a) the learning sequence - in what order should the content be structured?

b) Learning plans - how is learning to be promoted? (Methods to be used, plus learning aids.)

c) Training staff - who is to help the trainees to learn?

d) Timetable - where is the training to happen, and when? And how long will it take?

8. Prepare training materials

Use a learner-centred approach - viz. observe learning principles, use visual aids and attempt to maximise trainee activity.

9. Conduct training

Pay close attention to the training environment.

10. <u>Prepare and administer measure of the training</u>

Prepare exercises, projects, etc. to help measure how effectively the material is being learned.

11. <u>Check the results</u> (i.e. assess training effectiveness)

a) Validation

(i) internal - has the training achieved its specified objectives? (checks)

(ii) external - were these the right objectives in the first place - i.e. were needs correctly identified?

b) Evaluation

(i) were the results worthwhile? Did they justify the effort and resources used?

(ii) could the same results have been achieved more effectively and economically in some other way?

12. <u>Follow-up after training</u>

If possible, check the subsequent performance of the participants after a suitable interval to see if the learning has been "transferred" into the working situation.

SELECTING YOUR TRAINING METHODS

Objectives	Tutors: 1. To establish what methods are already being used by participants. 2. To outline the range of methods available for use in training and their effectiveness. 3. To show the value of including a variety of training methods in courses. Participants: 1. To practise and adapt new training methods for personal use.	
Document	Paper 5: "Selecting your Training Method".	
Time	45 minutes	
Method	Presentation to whole group. Blackboard listing. Group discussion.	
45 mins	Presentation to whole group on the range of methods available and their effectiveness based on Paper 5, "Selecting your Training Method". List the methods available on the blackboard and ask participants to come up and tick the ones they use. Establish in discussion why their range is limited (if it is, which it may well be) i.e. is it because of - habit - lack of skill or confidence in the others - lack of resources - expectations of their organisations, colleagues, participants?	Explain that they will be learning and trying out a range of methods on this course so that they can learn what they are like and use the ones they prefer in their work.

PAPER 5

SELECTING YOUR TRAINING METHOD

Once you have made an initial assessment of the training needs of your target group, and prepared a set of objectives which match those needs, you have to choose a method or methods which will help you achieve the objectives.

Most trainers choose methods with which they are familiar in developing training programmes. This paper will outline several methods for use in training with the aim of encouraging you to try out different ways of teaching and choose the most appropriate one to meet your objectives.

Lecture or information session

This method is used to put across a certain body of information to a group, by using a speaker (the trainer or an invited "expert"). The information contained in a lecture will often be new to the audience, and the aim of the lecturer should be to put it across with humour and confidence, and in a way that will encourage the audience to react favourably and follow it up.

The presentation of a lecture can be varied by visual aids and demonstrations, but this method should be avoided after lunch or late in the evening when students are tired.

Discussion-leading

Discussions are used to help the group think through a subject or problem, not to transmit new knowledge to them. The trainer needs to be a skilled facilitator and to be able to keep the discussion on the topic and on time. Summaries should be introduced at certain points in the discussion to indicate progress, and a final (printed) summary of the main points can be useful for group members.

Discussion leaders need to work hard to ensure that all participants contribute to the discussion and feel included.

Learning by doing

There are several methods of learning, but perhaps the most effective method is the one that teaches by personal experience. As Confucius said:

> to hear is to forget
>
> to see is to remember
>
> to do is to understand

Learning by experience is usually learning which is never forgotten. Could you learn to drive a car by attending a series of brilliantly presented lectures?

In presenting a learning-by-doing teaching method you are enabling the students to learn from the activities and experience they participate in. You provide the necessary information and guidance. Your own role as trainer changes from performer to manager of other people's programmes. You still have an important role, but as the facilitator you are no longer the centre of attention, and can therefore relax a bit more.

Participants may, however, be quite threatened by the need for personal involvement, so trainers need to be sensitive to reaction.

Effective learning-by-doing exercises are very valuable because they give:

- full participation
- active learning - illustrating points, trying new skills
- feedback in a supportive environment
- group interaction
- fun.

Most learning-by-doing exercises need time, particularly the simulations, games and role-plays.

The case study

This use of a real-life incident can be very useful in training participants to plan how they deal with similar situations. It involves the presentation of a case history either verbally, on paper or visually (i.e. film or cartoon), together with questions aimed at drawing out the principles of the response.

A GAME OR EXERCISE can be chosen which will achieve the objectives you may set for a session. You can use a variety of exercises within the same session if you can't find an exercise which meets all the objectives.

The game distances people from the real situation, but enables them to test their reactions in a non-threatening way.

A SIMULATION aims to get as close to real life as possible, and may induce a little more nervousness. Participants need to be given a problem to solve and an outline of the events involved.

A ROLE-PLAY takes one step further in giving participants a character and personal details. The role-play is usually a personalised replay of an incident, in which one participant plays herself.

Whichever training method you choose, you will need to plan the session carefully to ensure that participants have time to learn and take in the information you are giving them. Your session plan should emphasise the learning priorities, and you should beware of trying to include too much information or too many different methods.

USING TRAINING AIDS

Objectives	Tutors: 1. To acquaint participants with the range of aids available. 2. To convince them that presentations are greatly improved by their use (memory and enjoyment). 3. To give them practice in using those aids for which they have resources. 4. To help them to learn to use aids by experimenting with them and becoming "comfortable" with them. Participants: 1. To show that they can use some form of visual aid.	
Document	Paper 6: "Training Aids".	
Time	2 hours 30 minutes	
Method	Presentation to whole group. Practical (individual) exercises on presentation, and use of visual aids.	
30 mins	Short plenary presentation on the use of training aids and their advantages, in which training aids are demonstrated. Questions answered on practical issues. Base the presentation on Paper 6, "Training Aids".	Focus on encouraging them to try using aids if they don't already. Show how they help the trainer as well as the student.
15 mins	Coffee break	
2 hrs	Practical Exercises in Subgroups In each subgroup the participants prepare a brief presentation (5-10 minutes) on the training projects on which they are currently engaged. They must use some visual aids and the tutor can give guidance on the preparation of these. Each participant presents in turn to the subgroup, receiving feedback on their visual aids and presentation from the rest of the group and tutor.	Be supportive and encouraging. Remember this sort of exercise makes people nervous.

PAPER 6

TRAINING AIDS

Introduction

Training aids are tools used by the human instructor to help communicate with an audience and increase its understanding. Any device which supplements the teacher's voice and reaches to the student's mind through one or more of the five senses is thus covered by our definition.

Trainers are inundated with information and advertising on new materials, aids, equipment and machines for use in training. Most trainers would agree that benefits can derive from the use of such equipment, yet frequently expensive aids and equipment are grossly under-utilised or used ineffectually.

Training aids and equipment

Tests have shown that the use of training aids and equipment can, and frequently does, increase the rate and amount of learning. However, they are only aids to learning and do not replace the human teacher.

To be most effective, training aids should be designed for a specific purpose, and their use and contribution should be evaluated and checked.

The use of visual aids and equipment does not always increase either the rate or the amount of learning. In certain situations, aids explain or amplify a specific point made by the lecturer, or perhaps demonstrate a factor which is difficult to describe verbally. However, unless suitable and used correctly they can even detract from the presentation of the lecturer.

There are a number of factors associated with the effective use of training aids and equipment, which must be considered:

- The use of appropriate aids and equipment should be considered when the course is designed, so that it can be structured accordingly.

- The effective use of such aids and equipment requires careful planning, preparation, set-up and organisation, and planned presentation.

- The user must be trained to handle the aids effectually and to operate equipment efficiently.

- The aids and equipment used must be appropriate and meet the specific requirements of the course or session, with particular reference to the expected audience.

Provided these factors are satisfactorily covered, then the use of training aids and equipment can produce a significant contribution to learning. What is required, therefore, is a systematic approach to the selection and use of such aids and equipment.

Types of training aids

Most training aids are visual - the eyes are the quickest and most sensitive means of transmitting knowledge to the brain. Such aids complement the words of the lecturer and ensure that the more receptive sense, that of sight, is also involved with the subject being taught.

The power of the other senses should not be neglected when choosing aids. Verbal or musical assistance can be given by the tape recorder, the gramophone or the film sound track. Such aids are particularly valuable when teaching languages or music. They can also be used to rest the lecturer and divert the audience.

Touch, taste or smell of objects will sometimes be relevant to the training and should be demonstrated. Examples would be the "feel" of a new cloth or plastic, the taste of food or drink products and the distinctive smell of organic chemicals.

The value of visuals

The most important factor in good teaching is effective communication. Your task is to evolve in the audience's mind, ideas and concepts similar to those in your own. As a result, in communication a picture is often worth a thousand words. Pictures can portray instantly and vividly things that are impossible to convey verbally. They save time, create interest, bring variety, add impact and stay in the memory long after the words have left it.

Visual aids can also make life easier for the presenter as an aide memoire. A glance at the next slide or flipchart can help you through those dreadful moments when the mind goes blank.

White boards and blackboards

At the front of many lecture rooms is a board of some description. It does not matter whether it is black, white or green; the principles for using it are much the same:

- it is better not to talk while you are writing as your back is to the audience;

- clean the board as soon as you have finished with what is on it;

- print important words in capitals, the others should be in lower case - and lower-case printing is usually much more legible than handwriting;

- make sure everyone in the audience can see the board when you have finished writing.

Large white paper pad and felt pen

This is much like the white board in principle, and the same rules apply, with the following differences:

- You cannot erase, so prior planning is needed to avoid making mistakes.

- Each sheet can be turned over when you have finished with it. You may wish to stick completed sheets up around the wall, otherwise they disappear from view.

- The easel should be checked for stability.

- Most felt pens need to be kept upside down or horizontal when you are not using them to keep the ink flowing.

- Coloured chalks and wax crayons can also be used.

- Be careful with the colours you use. You will find that red is quite hard to see from the back of the room - stick to black, blue or green as much as possible.

Flipcharts

These are simply large white paper pads on which the visuals have been drawn beforehand. They can be carefully prepared in your own time before the presentation and are likely to look much nicer than visuals drawn on the spot. Beware of writing or drawings which cannot be seen at the back of the room! Flipcharts are not suitable for very large audiences.

Felt boards

These are surfaces to which shapes, diagrams and captions can be fixed, simply by placing them in position. A special material ("flock paper" - or, at a pinch, small pieces of sandpaper) on the back of your visual makes it adhere to the felt surface. If a felt board is not available, a blanket over a board on an easel will do just as well.

Felt boards can be used with large groups because the prepared material can be large and bold. They are an excellent aid because they allow for the build-up of visuals, but with material which looks good because it has been prepared beforehand.

Magnetic boards

These consist of sheets of iron or tinplate on to which shapes, backed with magnets, will adhere. They are particularly useful for showing the effect of moving shapes to different positions. Many white boards have a metallic backing and can be used as magnetic boards.

Films

Films can be a most absorbing instruction method, but they are easily regarded as entertainment by the audience. They need to be introduced with care. If you want the message to be retained you should reinforce it afterwards in some way, such as a discussion or a related case study.

Slides

Good slides can be as absorbing as motion pictures, and they do have the extra advantage of flexibility. You can alter sequence, interrupt and draw attention to detail. There are, however, two disadvantages. One is that the room has to be darkened for good projection; the other is that slide projectors often stick or show slides upside down! Careful preparation and practice with the equipment are essential.

Overhead projector

This extremely useful instrument can be used in a fully lit room, and enables the presenter to face the audience all the time. You can build up diagrams in stages by using a series of transparent overlays. You can also write on the transparencies or point out detail. In fact, the overhead projector can successfully replace most of the aids previously mentioned.

The overhead projector is the favourite visual aid of most presenters, so here are some guidelines for using it to its greatest effect:

- Keep your slides in strict order: searching for slides can spoil an otherwise polished performance.

- Switch the projector light off after each slide. Only switch it on again when the next slide is in position.

- Ensure, before you start, that you are not obscuring the screen from part of the audience.

- Practice makes perfect with an overhead projector, so be prepared to have to correct some mistakes when you first start using one.

- And a bonus - the frames for the slides provide a perfect place for writing your own "prompt" notes.

How to design a good visual

There are three golden rules for a good visual:

- keep it simple, bold and uncluttered;

- use very few words;

- wherever possible, replace words by pictures.

Remember, you are using visuals to create interest, alleviate boredom, add impact and aid retention. Slide after slide of lists of words and phrases can be just as boring as a monotonous spoken delivery. Slides must be interesting in order to create interest. There is no need to be an artist to design good visuals. Tracings from cartoons or simple "matchstick men" can get a visual message across very well.

Most poor visuals are too complex, too crowded or too wordy. This is because one slide is used when five slides are needed. If you must show a complex visual, then build it up slowly in front of the audience. Wherever possible use simple visuals, preferably with pictures, and fill in the detail with the spoken word. Visuals are supposed to aid your presentation, not replace it.

Conclusion

Few training aids will contribute to learning on their own. They can, however, contribute dramatically to efficient learning if used with discrimination and correctly. All training aids should be used for a carefully defined function, they should be designed to fulfil that function, and they should be evaluated on the effectiveness of that use.

OBJECTIVES

Objectives

Tutors:

1. To establish the value of defining objectives clearly for each training exercise, using tutors' own documentation as an example.

2. To define difficult types of objectives and their relevance/usefulness.

3. To link the need for objectives with the need for careful diagnosis of both the target group and an assessment of its needs.

4. To enable participants to design their own objectives for a training exercise and present them to their subgroup.

Participants:

1. To demonstrate an understanding of how to set objectives by defining objectives for a session they use often in their work and presenting it to the subgroup.

Documents

Paper 7: "How to Set Lesson Objectives".
Paper 8: "Objectives for Workshop" (see p. 223).
Paper 9: "Teaching Objectives".

Time

1 hour 45 minutes

Method

Individual exercise in small groups - programmed learning text.
Presentation to whole group.
Small group exercise in setting objectives.

30 mins	Presentation to the whole group on how to set lesson objectives, illustrated by objective setting done by the tutors for this programme.	A practical bias - emphasis on simple, short objectives, their advantages and real difficulties in phrasing them.
45 mins	The next work is done in the subgroups. Each participant completes a programmed learning text on "Teaching Objectives" (Paper 9). The tutors give guidance where required, and discuss participants' reactions when they have all finished.	

30 mins	Participants then return to the same subgroups for a short practical exercise on setting objectives for their own course. Guidance from tutors will be needed. Participants then exchange objectives and briefly discuss them.
1 hr	Lunch break.

PAPER 7

HOW TO SET LESSON OBJECTIVES

Why set objectives?

In planning any session for any type of training course, a trainer usually has an end result in mind, some activity she wants to teach the trainees to do or some knowledge she wants them to apply or adapt for their own work or personal use.

If the trainer's aim or awareness of the end result is vague or confused, the students will find it hard to focus on what they are learning, and will therefore learn less and perform less well in achieving the goal.

If the trainer has a clear set of objectives in her mind, she will be better able to choose activities which will help the students to achieve the final goal.

The more clearly the objectives are written, the easier it will be for trainer and students to measure how well the objectives have been achieved.

How are objectives decided on?

If a trainer is trying to provide information and training which will be relevant and useful to a certain group of people, she will probably start by finding out what the group needs to know and the skills they need to perform effectively. So she will need t(do an analysis of training needs in order to establish the kinds of activities which will give the students useful skills and knowledge.

She may find that she has too many goals to achieve in one session or one course. She must then decide what she can effectively expect to cover in the time available. This involves priorities, or what we might call

musts - the skills/knowledge the students must have,

shoulds - things they would find valuable and useful,

coulds - additional but non-essential goals.

Levels of activity

In setting objectives to meet specific training needs, several levels of activity may be involved, and the trainer should be able to select appropriate tests for evaluating the student's performance at the end of the session.

Evaluation of students' performance

Students may be asked to show what they have learned by

1. reciting the information they have learned,

2. demonstrating an understanding by using a new skill,

3. applying the information/training to a practical activity,

4. comparing different methods or pieces of information,

5. evaluating learning by producing a critical analysis.

These are all behavioural objectives - that is, learning goals which require a specific kind of behaviour or activity from the students, and which can therefore be easily measured.

Writing objectives

Once the specific learning goals have been set, the trainer can write objectives which will match them. The objectives should be simple and easy to understand. It may take several sentences to state an objective clearly, but if this is done, the trainer has established a clear guide for the learning programme.

Should students know the objectives?

There is much discussion about whether students benefit from knowing the objectives the trainer has for a session or course. Several studies suggest that students learn better if they know at the start of the session what the trainer wants them to learn.

Often, when no final objective is stated, students spend a lot of time trying to work out the purpose and value of the instruction they are receiving. If they know what the trainer's objectives are, the group can then focus their energies on relevant tasks and not waste their time on side matters or outguessing the trainer.

Summary

Objectives should be written down and should be short and clear to both trainer and students.

Objectives must also be

- achievable,

- measurable (i.e. in time, quantity, quality),

- relevant to the students' needs and priorities, and

- challenging enough to encourage students to want to learn.

Some objectives may be hidden and not initially obvious to participants, but once achieved they must be obvious to students.

If a trainer writes objectives in terms of student behaviour, it will be easier to

1. choose suitable learning activities for students,

2. clarify what she wants students to learn,

3. evaluate the students' performance.

PAPER 9 *

TEACHING OBJECTIVES

Objectives of this paper

The course member, on completion of this paper, should be able to recognise and design teaching objectives. More specifically, after finishing the paper the reader will be able to

- distinguish between measurable and non-measurable objectives,

- convert non-measurable objectives into objectives that adequately describe what she wants the student to be able to do after instruction.

Examples of teaching objectives

1. Objective: At the end of this course students will have developed qualities of rational thought and sound judgement.

Try to decide what the objective means and what kind of training programme would achieve the objective. Do you think others reading this objective would reach a similar decision to you?

Answer YES or NO.

Do not turn the page until you have answered.

*see page 223 for Paper 8, "Objectives for Workshop".

The answer is NO, for the objective is broad and permits a variety of interpretations.

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2. Objective: The student will gain an appreciation of the importance of the World Bank in funding development projects.

    - What kind of training programme would achieve this objective?

    - How could you tell if the objective had been achieved?

    - Do you think most people would agree on the meaning of this objective?

Answer YES or NO.

<u>Do not turn the page until you have answered.</u>

The answer is NO, for although this objective limits the content to the World Bank in development programmes, it is still vague. Such objectives are of little help in planning lessons or training courses. Suppose you wished to find out whether your training had achieved this kind of objective. What types of tests and observations of the students would help you to judge whether the objective had been achieved? This question is difficult to answer because the objective is vague and non-measurable.

Ask the same question of the following objectives. How can you tell if they have been achieved?

3. Objective: The student will grasp the significance of the environment in which she works.

   Objective: Students will become familiar with the basic concepts of teaching.

Do you think that most trainers would agree on the kind of tests that would reflect achievement of these goals?

Answer YES or NO.

Do not turn the page until you have answered.

Again the answer is NO. Trainers would disagree over ways of measuring whether these objectives had been achieved.

Unless objectives clearly communicate what the trainer wants to achieve, they are of little teaching value. She cannot make lesson plans for ambiguous objectives.

Objectives should allow the trainer to know where she is going. They should enable her to design lesson plans for herself and the students so that the objective will be achieved. Yet in spite of this, vague objectives are popular with many trainers. The next few examples illustrate some common pitfalls.

"Content coverage" objectives

Some trainers describe objectives in terms of concepts, topics or generalisations to be treated in the course.

The course will cover:

1. the theory of training,

2. group behaviour,

3. organisation for training.

These objectives are examples of such "content coverage" goals. In fact, the trainer does not merely wish to "cover" these topics; rather, she expects that coverage will help the students to become trained. Such statements of objectives really miss the point of training.

Objectives describing trainer behaviour

Other trainers state objectives in terms of what the trainer is to do during the training session.

During the session the trainer will:

1. analyse the causes of industrial strife in Britain,

2. discuss the background of the TUC,

3. point out the future perils to industrial peace.

Again the focus is wrong. Instead of planning what she will do, the teacher should be interested in how her activities will influence her students.

Such objectives fail to provide the trainer with clear guidance about ways in which her teaching should affect the students.

Broad objectives

Some trainers state objectives in broad terms and with no specific references.

The students will:

1. develop appreciations ...

2. increase their interest in ...

3. develop conceptual thinking.

How do you plan the lesson to achieve such objectives? Because they are non-specific

- almost anything could be done to achieve them;

- you have no way of finding out if they have been achieved.

What is a good training objective?

How should training goals be stated so that they

- help the trainer to select successful learning methods?

- help the trainer to evaluate student performance to see if the objectives have been achieved?

Good training objectives must be stated in terms of student behaviour

Meaningful training objectives must be stated in terms of how the student behaves, or will be able to behave, after training. The more specifically student behaviour can be defined, the better. When the goal is to change the student's observable behaviour, you can tell if the objective is achieved by observing whether a behaviour change has occurred.

How should a trainer describe the way in which a student will behave after training? Consider the following description.

The student will understand.

What does the trainer mean by "understand"? What evidence would she use to show that this objective had been achieved?

Although most people have similar definitions of the word "understand", if asked to describe student behaviour required to demonstrate understanding, their interpretations could differ widely. A trainer could say that the student understood the meaning of the Equal Pay Act when she could:

- write out a description of it from memory,

- answer a series of true/false questions about its background,

- identify instances where the Act had been violated.

Terms such as "understanding", "knowledge" and "insight" allow a variety of interpretations. Even though "understanding" refers to student behaviour, it means little until the trainer further specifies what type of student behaviour indicates understanding.

Have a look at the following objectives to see if they are specifically stated in terms of student behaviour.

4. Which phrase allows for fewer interpretations?

   A. to select answers correctly

   B. to realise fully.

   Answer A or B.

Do not turn the page until you have answered.

Phrase A is clearer because it describes a measurable form of behaviour. Phrase B describes a vague, internal type of response which, because it is not measurable, may be interpreted in many ways.

---

5. Pick the phrases which identify a form of observable student behaviour. At the end of the session the student will be able to:

   A. differentiate

   B. enjoy

   C. comprehend

   D. construct.

   Circle the appropriate letters.

Do not turn the page until you have answered.

A and D are correct answers.

"Differentiating" and "constructing" identify behaviour that is measurable, while "enjoying" and "comprehending" refer to internal responses of the individual which can't be measured.

---

6. Select the two measurable phrases:

   A. to think

   B. to repair

   C. to answer

   D. to appreciate.

   Circle the appropriate two letters.

<u>Do not turn the page until you have answered.</u>

B and C are the correct answers, for "repairing" and "answering" are measurable, whereas "thinking" and "appreciating" are not at all specific.

---

7. Which objective is less ambiguous?

   A. The student will learn how to use an electronic calculator.

   B. The student will solve five multiplication problems using an electronic calculator.

   Circle the appropriate letter.

<u>Do not turn the page until you have answered.</u>

Objective B is less ambiguous. "Solving" is an identifiable form of student behaviour; the student's answers in a test would show if she had correctly "solved" the problem. "Learning", on the other hand, is one of those words that is open to many different interpretations.

---

8. Which of these objectives is more specific?

   A. The student will know the internal workings of the firm.

   B. The student will describe in writing the daily work of the lift operator and the lavatory attendant.

   Circle the appropriate letter.

<u>Do not turn the page until you have answered.</u>

Objective B is more specific since it identifies the student behaviour that is sought, namely, written description. Objective A hinges on the interpretation of "know", which could be something as simple as merely listing the names of the different departments.

---

9. Select the measurable objective.

   A. The student will state the types of courses offered by the following training centres...

   B. The concept of training needs assessment will be treated.

   Circle the appropriate letter.

Do not turn the page until you have answered.

The measurable objective is A.

---

10. Choose the measurable objective.

    A. The student will be familiar with the major training methods.

    B. The student will write a plan for a training session, using one of the training techniques learnt on the course.

    Circle the appropriate letter.

<u>Do not turn the page until you have answered.</u>

Objective B is the correct answer.

---

11. Choose the measurable objective.

    A. The student will want to become a good trainer.

    B. When given two objectives, the student will be able to identify the one that is properly stated.

    Circle the appropriate letter.

<u>Do not turn the page until you have answered.</u>

Objective B is correct, for although it is important to want to become a good trainer, it is difficult to determine whether or not a student wants to. On the other hand, identifying properly stated objectives, as in choice B, is observable behaviour - and, incidentally, will contribute much toward a student's efforts in becoming a good trainer.

Now that you have had considerable practice in identifying measurable objectives, here is a more difficult task - the writing of such objectives.

Writing behavioural objectives

12. Is this objective measurable?

    The student will know the three most recent Ministers of Education.

    Answer YES or NO.

Do not turn the page until you have answered.

The answer is NO. Even though this is a rather limited objective, the verb "know" is ambiguous because a number of observable student behaviours could be used to reflect such knowledge.

---

13. Now rewrite objective 12 so that there is no ambiguity about the behaviour that would reflect knowledge of the names of the three most recent Ministers of Education. Write your answer in the space provided.

Do not turn the page until you have answered.

Look at your objective and decide whether an observable student behaviour is described. Here are three possible ways of stating the objective:

1. The student will circle the names of the three most recent Ministers of Education.

2. The student will list in writing the names of the three most recent Ministers of Education.

3. When presented with 3 multiple choice questions - each presenting one of the three most recent Ministers of Education and three distractors - the student will choose the correct answers.

If your objective was similar to these it is acceptable. When your objective requires a test, make sure you describe the type of test that will be used.

---

14. The following objective is non-measurable. Rewrite it so that it can be measured.

The student will gain a working knowledge of a tape recorder.

Write your answer in the space provided.

Do not turn the page until you have answered.

See if your objective describes an observable student act or an observable product of a student act. If it does, it is a measurable objective.

---

15. Reword this broad objective so that it is specific.

    The student will become familiar with the principles of needs assessment.

    Write your answer in the space provided.

Do not turn the page until you have answered.

There are many choices available in rewording this objective in measurable terms.. The kinds of changes in behaviour that might be made are almost unlimited. The students could

- list in writing five principles of needs assessment, or

- write a fully documented research paper.

To tell whether your objective is properly stated, you must judge whether it describes a measurable student behaviour or a measurable product of student behaviour. If it does, your objective is acceptable.

CASE STUDIES

Objectives

Tutors:

1. To explore the use and effectiveness of case studies as a learning method for training.
2. To give participants experience in the use of case studies by means of practical exercises.
3. To reinforce the importance of effective summarising at the end of all training methods.

Participants:

1. To demonstrate an ability to use case studies for training purposes.
2. To display an ability to adapt techniques for use in training in order to ensure relevance to the trainees.

Document

Paper 10: "The Case Study".

Time

1 hour 30 minutes

Method

Small group exercises with tutor presentation. Group discussion.

This session is conducted in subgroups. The tutor gives a brief presentation on case studies based on Paper 10, "The Case Study".

The tutor then distributes a case to each member of the subgroup and asks them to read it and then discuss it in pairs or threes. Each pair or trio then reports their analysis to the rest of the subgroup. Each report is followed by a general group discussion.

Tutors can also explain that case studies can be presented in visual form, i.e. film or cartoon.

The group then discusses the effectiveness of the method.

15 mins

Coffee break.

PAPER 10

THE CASE STUDY

Some training objectives are best achieved by drawing principles from real life examples or illustrations. In these instances a case may be the most appropriate training method.

The use of a case study implies more than simply distributing copies of the case material to the audience. This section outlines the stages in conducting this type of training session:

- choosing case material
- planning questions
- organising analysis of the case
- discussing the conclusions
- consolidating the results.

Choosing case material

Case material should be:

- relevant
- realistic and interesting
- short enough to be analysed in the time available
- and it should contain a problem.

Sources of case material include:

- published books, films, records
- company files and reports
- government reports and publications
- newspapers and magazines
- students' own problems
- your own experience.

Planning questions

You should include a series of questions with the case study which enable the students to draw the necessary principles from the material. The questions should be written or asked orally during the discussion phase with your training objectives in mind.

Organising analysis of the case

Usually case studies are presented in handout form so that the audience can study the material and answer the questions. Even if the case is presented in a film, the audience should have written copies of the questions so that they can spend some time considering their answers. This method of training does not lend itself to snap answers in response to questions thrown at the audience, although good questioning can be an effective way of guiding the discussion after the audience have had a proper chance to assimilate the material.

The cases may be analysed by individuals or by syndicates. Syndicates are often best, but they take up more time.

Discussing the conclusions

If the cases have been analysed in syndicates then one person from each syndicate should report their answers and conclusions. Each report should be followed by a general group discussion.

If individuals have analysed the cases, then you can choose a different person to answer each question and invite comments from the rest of the group.

Consolidating the results

As participants report their answers, these should be summarised on flipcharts at the front of the room. You can then give a final summary by going through these flipcharts. The answers can be duplicated and distributed to the participants afterwards.

LEADING DISCUSSIONS

Objectives	Tutors: 1. To enable participants to evaluate their own performance in leading discussions in small groups. 2. To reinforce the need for positive feedback, with reference to previous documents, within practical exercises. Participants: 1. To demonstrate an ability to lead a discussion and encourage full participation. 2. To display a practical understanding and effective use of constructive feedback.	
Documents	Paper 11: "Leading a Discussion". Activity flowchart. Leader effectiveness evaluation form. Paper 12: "Discussion Leader".	Background reading at end of session.
Time	1 hour 30 minutes	
Method	Presentation to subgroup by tutor. Participants lead discussion with subgroup. Feedback from subgroup to each participant. The tutor gives a brief presentation based on Paper 11, "Leading a Discussion".	
	The tutor then asks each member of the group to think of a topic for discussion. Each group member then leads a short discussion on her chosen topic aiming to apply the principles taught. During each discussion the tutor marks the activity flowchart. After each discussion, the group members fill in the evaluation form, and the leader then receives feedback from the rest of the group and the tutor. The evaluation forms of each leader are given to them after their discussion has been evaluated.	Give any poor performance a chance for a re-run after feedback.
1 hr	Lunch break.	

PAPER 11

LEADING A DISCUSSION

Group discussions are a useful training method when students have some knowledge, experience or opinions about the subject. This paper outlines ways of conducting such discussions so as to ensure the trainer's objectives are met.

General principles of discussion leading

1. Let the group have the freedom to express their own thinking and not be dominated by the conference leader.

2. Allow participants to express their thoughts fully.

3. Refrain from passing judgement on any contribution given by an individual - let the group decide whether she is right or wrong.

4. Allow the group freedom of expression whilst maintaining overall control of the discussion subject.

5. State the basis of the discussion so that all participants may follow.

6. Be co-operative.

7. Allow individuals to retain their self-respect in the eyes of the group.

8. Remain impartial.

9. Control the discussion by asking questions.

10. Be precise and to the point.

11. Keep humour to an acceptable level.

12. Keep discussion moving.

13. Bring the group quickly to accept matters of fact. Keep to the schedule set for the programme.

14. Master the use of questions.

How to master the use of questions

The use of questions as a means of directing and stimulating discussion is one of the most effective techniques used by the discussion leader. Various types of questions are recommended, such as leading, suggestive or throught-provoking questions. Many of these may be addressed to the group as a whole or to individuals. They may be general or specific as to the nature of response required.

Whatever the type of question may be, or the nature of the response required, the most effective are those which cannot be answered by "yes" or "no". Those asking "why", "what", "when", "where" and "how" are preferred. The manner in which the question is asked is of the greatest importance.

To be successful, a discussion leader must develop skill in asking questions. Questions are vitally important tools which should be carefully selected and skilfully used. The technique of intelligent and purposeful questioning is an art.

Types of questions most used in leading discussion

THE OVERHEAD QUESTION. The overhead or general question is a question addressed to the entire group, not to an individual member of the group. An illustration of an overhead question is:

"What does the group think about overtime for supervisors?"

The overhead question is used chiefly to promote group thinking, to start discussion and to bring out different opinions.

THE DIRECT QUESTION. The value of the direct question is based on the fact that certain people are sometimes timid and reluctant to state their opinion or reasons for their points of view. One good use of the direct question, then, is to ask the individual not taking part what she thinks about the matter under discussion. The implication that she has had special experience or some special knowledge of value to the group appeals to her job pride or to her self-respect and offsets her timidity or reluctance to engage in a discussion. When a person's mind is obviously wandering, the direct question brings her mind back to the topic under discussion - it acts as a sort of jolt to her attention. A properly chosen question can bring the thinking of the group back to the discussion or the individual's thought back to the point. The following case illustrates this point:

- An individual member of the group is talking about something irrelevant to the question under discussion. A direct question, such as "How does that tie in with the problems we are discussing?" will get her to see that she is "just talking" or that she is not talking to the point.

QUESTIONS IN PLACE OF STATEMENTS. In following her role as mediator rather than participant, the leader can make use of questions in another fashion. There are a number of situations that may arise which call for some positive guidance on her part, but if that guidance becomes obviously controlled the leader will reduce her effectiveness. Instead of a direct statement, then, the leader can achieve the same result by phrasing her ideas in the form of a question, thus making her guidance of the discussion more subtle.

Types and examples of questions

TYPES OF QUESTIONS

1. Overhead: general question to whole group

2. Direct: asked of specific person

3. Factual: seeking facts, data, information

4. Leading: questions suggest answers

5. Ambiguous: two or more answers

6. Controversial: two or more answers, and people are likely to disagree

7. Provocative: to incite people to answer

8. Redirected: directed at leader but returned to group

EXAMPLES OF QUESTIONS

1. Overhead: "What is the definition of 'enthusiasm'?"

2. Direct: "Bill, what are behavioural objectives?"

3. Factual: "What is the cost to a company of a manager's motor vehicle?"

4. Leading: "Would you cease calling on a sales prospect who has no potential whatsoever?"

5. Ambiguous: "Is it a good policy to point out faults to your manager?"

6. Controversial: "Are leaders born or made?"

7. Provocative: "What do you think of the statement 'Most managers drive their men too hard'?"

8. Redirected: Participant to conference leader: "What is meant by 'sincerity'?"

   Conference leader:
   "Freda, how would you define 'sincerity'?"

Techniques of questioning

1. Remember that the main purposes of a conference meeting are to stimulate the conferee's thinking, arrive at satisfactory conclusions and achieve maximum retention.

2. Each question asked should have a definite purpose in mind.

3. State each question clearly, leaving no doubt as to what is required.

4. Ask questions that are neither so easy as to require little thought nor so difficult that they discourage effort.

5. Ask questions in a natural manner, indicating that you have confidence in the conferee's ability to answer them.

6. Ask only questions that are answerable. It is unwise to highlight the conferee's ignorance.

7. Preface as many questions as possible with one of these words: "what", "why", "when", "where", "who", "which" or "how".

8. After asking each question, keep quiet and wait at least 30 seconds for an answer.

9. Take answers from one person at a time.

10. Encourage complete and clearly expressed answers.

11. See that everyone has equal opportunity to provide answers.

Summary and conclusions

Discussion leading can be more difficult than presenting a lecture. The trainer has to manage the group in such a way that they come up with the points she wishes to get across. She also has to manage the group atmosphere so that she encourages the group to discuss freely but keeps the discussion within the relevant subject area. The principles and techniques outlined in this paper will help the trainer to do this:

These general principles are:

- encourage free discussion without losing control;

- do not inhibit students by judging their answers or by asking them questions they cannot answer;

- intervene to keep the discussion relevant and within the set time;

- when guiding the discussion, turn your statements into questions;

- decide what you want to achieve before you choose the type of question to use;

- keep in your mind a list of the types of questions that are useful in discussion leading;

- give every student a chance to contribute.

PAPER 12

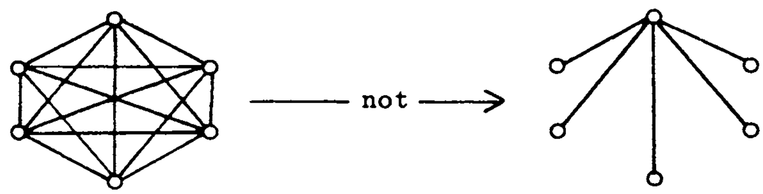
DISCUSSION LEADER

Although the trainer is the designated leader of a group, she may not have the group leadership at all times. Responsibility for achieving results should be shared by the whole group.

When discussion is under way, the leader's job is to stimulate and guide each group member into clear thinking and clear expression of her thoughts.

A democratic style of leadership is more likely to achieve full discussion than permissive or autocratic styles. Effective leadership of a discussion group requires the leader to have

- knowledge of group processes to use effective interaction patterns;



- knowledge of the topic;

- ability to think quickly: to follow what is being said and to anticipate questions which will be needed to move along discussion;

- ability to listen effectively;

- respect for all group members;

- ability to use words which are readily understood by the group.

DISCUSSION MEMBERS

Every discussion group is made up of different individuals. Also, people vary their reactions according to how they feel the discussion is progressing.

The Orator: This person wants to do all the talking.

Take a point from this person's remarks and give it to someone else for their comment; all heads then turn away from the orator, and she may be reminded of her fault without being publicly offended.

The Happy Wanderer: Goes off the point being discussed usually to introduce her pet theories.

Diplomatically explain that she is off the point at issue, and suggest that this point might better be dealt with at another time. Alternatively, pass this point to another member with the question "How does this fit in with what we are discussing?"

The Quiet and Bashful:

Start them talking by directing questions to them, asking for facts you know they possess or views you know they hold. Give a word of appreciation for their contribution.

The Quiet but Threatening Type: Have plenty they could say but believe that it is no good saying it; are suspicious of group discussion.

Try to probe for their grievance; if it comes to light, put it to the group as a perfectly reasonable matter to discuss. Such persons may then modify their negative attitude.

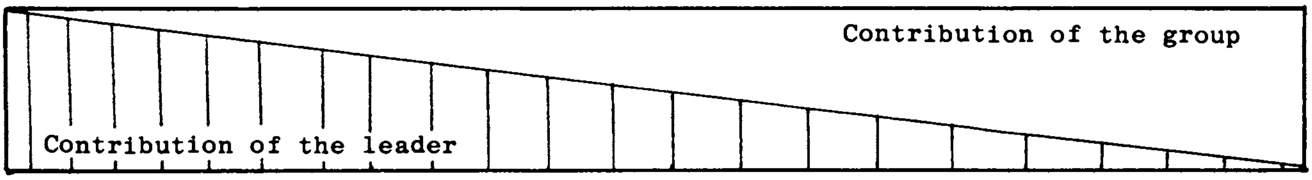
The Persistent Questioner: Tries to trap the leader.

Pass this person's questions back to the group for answer.

The Know-all:

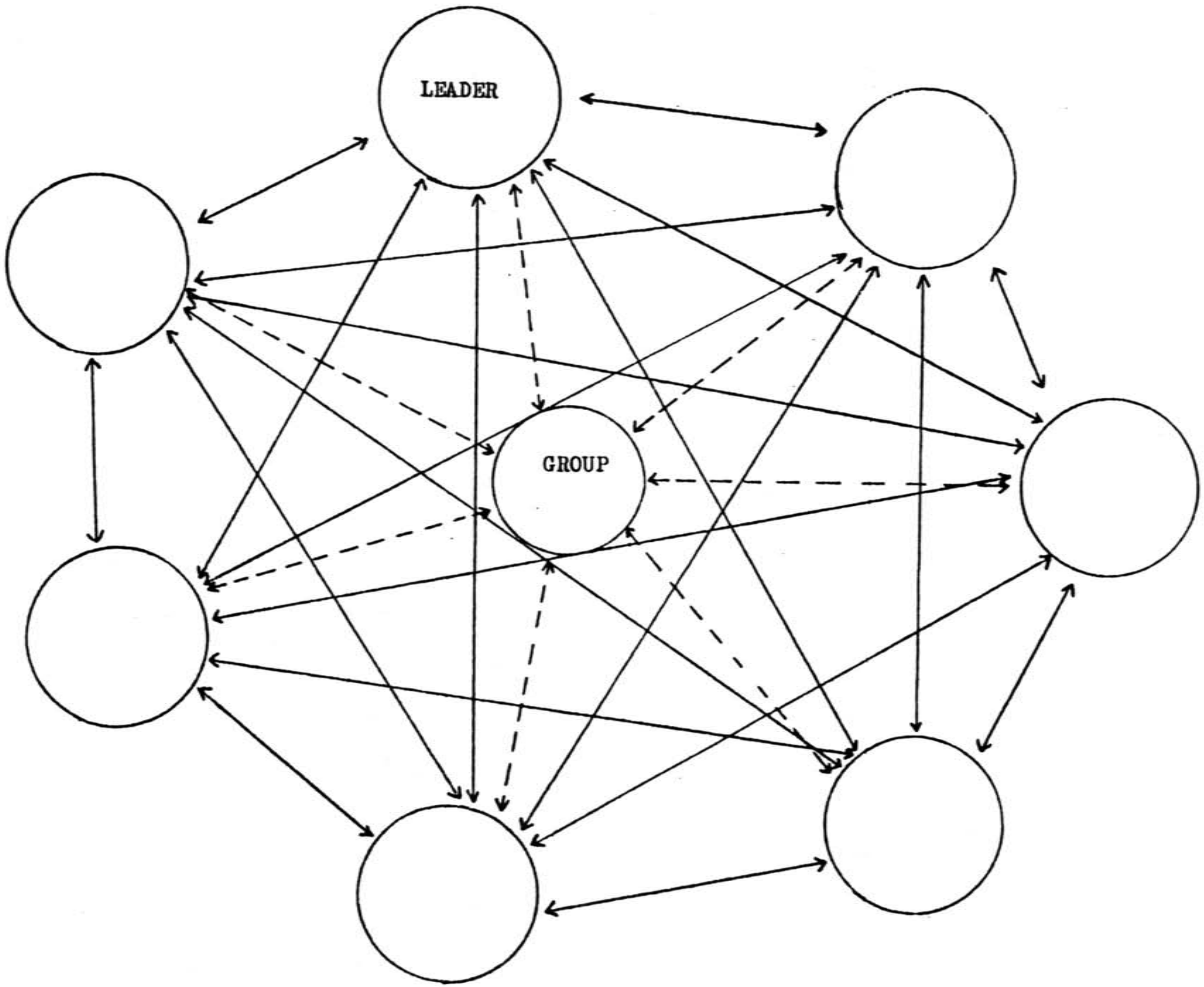
Pass her theories to the group.

SUMMARY



Lecture	Information session (or lesson)	Discussion
Leader makes most of the contributions to the subject and gives out most of the information.	Contributions by the leader and the group about 50-50. Leader not only "tells" but teaches the trainees to do something that is new to them.	Group makes most of the contributions to the subject. Leader develops thinking, guides discussion, helps group exercise judgement.
EXAMPLE: Prepared lecture or talk on "The Work of the Trainer".	EXAMPLE: Teaching group to make out a report.	EXAMPLE: A discussion of the question "How should a trainer develop a training programme?"
<u>WHEN TO USE</u> To present a body of new information. Give background and appreciation,	<u>WHEN TO USE</u> Explain procedures. Develop new skills. Extending knowledge.	<u>WHEN TO USE</u> When it is essential to gain group acceptance of a viewpoint or idea.
<u>KEY POINTS</u> Especially useful for large groups. When the speaker has special or technical information and the group has only basic information. Charts, pictures and other visual aids are especially helpful.	<u>KEY POINTS</u> This method is more successful if the group is held to fewer than 16 participants.	<u>KEY POINTS</u> Conference groups should range in size from about 8 to no more than 12. Participants should have the knowledge and experience which will help them contribute to the discussion and will make them capable of analysing the problem from information given by the discussion leader.

DISCUSSION TECHNIQUES - ACTIVITY FLOWCHART



DISCUSSION TECHNIQUES

LEADER EFFECTIVENESS

Name of Leader

Discussion Topic

Date

(Rate the discussion leader, the group and yourself by circling the number that most closely represents your appraisal of her performance. The descriptions in the left-hand column are supposed to reflect the most desirable practices; those in the right-hand the least desirable.)

THE LEADER'S ATTITUDES TOWARDS THE SUBJECT AND PARTICIPANTS

MOST DESIRABLE					LEAST DESIRABLE
Cordial	4	3	2	1	Unfriendly
Animated	4	3	2	1	Apathetic
Open-minded	4	3	2	1	Inflexible
Concerned	4	3	2	1	Indifferent

THE LEADER'S EFFECTIVENESS IN PERFORMING LEADERSHIP TASKS

Introduces problems fairly and clearly	4	3	2	1	Fails to stimulate discussion at outset
Keeps discussion on the beam	4	3	2	1	Lets discussion wander
Speaks only when necessary	4	3	2	1	Monopolises the discussion
Is informed on the topic	4	3	2	1	Is uninformed
Adapts to the group's desires	4	3	2	1	Sticks to preplanned outline at all costs
Introduces relevant material when it has been ignored	4	3	2	1	Lets the group ignore relevant material

Uses humour to lighten the atmosphere	4	3	2	1	Is humourless
Acts democratically	4	3	2	1	Dictates procedures
Handles interpersonal conflicts diplomatically	4	3	2	1	Ignores or overrides interpersonal conflicts
Uses visual aids	4	3	2	1	Relies on oral process only
Summarises frequently	4	3	2	1	Does not summarise
Summarises only group's contributions	4	3	2	1	In summaries, adds to or misinterprets group's thinking

THE LEADER'S LANGUAGE

Fluent	4	3	2	1	Hesitant
Fits the occasion	4	3	2	1	Inappropriate
Temperate	4	3	2	1	Emotionally loaded
Easy to understand	4	3	2	1	Hard to understand
Clear	4	3	2	1	Unclear

THE GROUP

1. Active	4	3	2	1	Passive

2. Whose participation was most helpful in this discussion?

3. What did she do that was helpful?

4. Whose participation was least helpful in this discussion?

5. What did she do that seemed to hinder the discussion?

YOU AS A GROUP MEMBER

1. Wanted to be involved	4	3	2	1	Preferred to sit it out
2. Were encouraged to be involved	4	3	2	1	Were discouraged from being involved

HOW GROUPS WORK

Objectives	Tutors: 1. To give participants information about group behaviour so that they can better understand the groups they work with. 2. To establish the main factors in group process and enable participants to analyse them clearly. Participants: 1. To display a knowledge of the processes involved in working in groups. 2. To show an ability to draw people into the discussion and encourage participation by all. 3. To analyse and to put into practice the strategies required to influence groups.	
Documents	Paper 13: "How to Influence Groups". Paper 14: "How Groups Work".	
Time	3 hours	
Methods	Presentation of theory/principles to whole group. Fishbowl exercise.	
30 mins	Presentation to the whole group on effective handling of groups, based on Paper 13, "How to Influence Groups". Answer questions. Divide the workshop into two main groups for the Fishbowl exercise. Explain that the exercise is designed to 1. give participants a chance to observe group dynamics for themselves so that they can become skilled at diagnosing what is happening in their groups; 2. give participants a chance to practise being influential in a group.	The subjects for the fishbowls should be chosen by the tutors on the basis of topics which seem relevant and interesting to the whole group.
2½ hrs	Fishbowl Exercise Aim of the exercise Fishbowl is a technique by which the trainer can help a working group to hold more	

effective meetings; to come to decisions which are of better quality, and more acceptable to those involved. The aim is also to help the participants to learn

- the distinction between process and content in a meeting;

- how strongly process affects the content and results of a meeting;

- how to use the type of process which will achieve high quality results.

<u>What do go before the exercise</u>

Fishbowl is a good teaching technique, but the participants need to be quite clear about

- what they are trying to achieve, and

- how to achieve it,

otherwise, the tutor will end up with a lot of puzzled participants. So the tutor needs to explain to them:

1. the aim of the fishbowl technique as outlined above;

2. that in a meeting a good result/decision depends on:

   - the skill, motivation, knowledge, etc. of the participants, and

   - the process they use

   (one without the other will not produce the desired results, so it is worth learning how to use good process);

3. the distinction between process and content and how process affects results. After your "teach-in" the participants should be able:

   - consciously to improve their process (even if only in a small way at first);

   - to observe process in a group of which they are not a member.

When you feel that the participants understand enough about group process to be able to apply what they have learnt, then outline the fishbowl exercise to them, so that they know what they are going to have to do.

Outline of the exercise

In the exercise, half of the group have a meeting while the other half watch them. After the meeting, the observations of the watchers are fed back and discussed. The roles are then reversed for a second meeting.

Number of participants

- optimum number 10-12
- minimum number 8
- maximum number 16

Topics for the two meetings

The topics for the meetings should be the issues on the working group's agenda at that time. Do not try to dream up some imaginary or irrelevant issue for the sake of the exercise. They are more likely to use their new skills if they see that the skills help them with the work they are currently doing.

The topics for the meeting should be so arranged that the second meeting is able to take the results of the first meeting and develop them further. The second meeting needs the decisions, analysis and assumptions of the first in order to proceed. The wording of the topics requires some thought, as the participants must know what they are expected to achieve at the end of each meeting. The tutor is advised to work this out beforehand, as an "on the spot" decision about the wording may be a poor one.

Topics
1. What obstacles do women face in participating fully in development projects?
2. Suggest ways of overcoming obstacles to women's participation in development projects.

Write the topic for discussion on the blackboard for all participants to see. This avoids confusion and misunderstandings.

The brief to the participants in the meeting

You have a ½ hour (or ¾ hour) to either

- answer these questions,
- solve these problems,
- make these decisions,

depending on the nature of the topic. We would like your written conclusions at the end.

The brief to the observers

Please observe the process of the meeting, who does what, and make a note of the reaction and result. After the meeting you will report your observations to the participants. (To make life easier for the observers give each just one person to concentrate on.)

The role of the tutor during the meetings

The main task of the tutor is to make observation notes on the group process in the meeting. She should only intervene with process comments if the meeting looks as if it is headed for failure or chaos.

The role of the tutor during the feedback sessions

First, ask the observers to report their observations. While this is going on the participants in the meeting should be asked politely to remain silent, otherwise they will be so busy defending their actions that they will not hear most of the process remarks. You will probably have to shut them up repeatedly.

Secondly, give your own observations to the group, making sure that you explain how the process that you noted affected the results of the meeting, for better or for worse, then allow a general discussion on the meeting in which everyone joins.

What happens after the Fishbowl exercise?

After a fishbowl exercise the participants should become more self-conscious about group process. The immediate result can sometimes be that the group becomes very democratic and achieves nothing. The tutor will have to remind them that they are concentrating on maintenance functions to the detriment of the task functions. Process is about both these functions. However, once this hurdle has been cleared the more able group members will probably behave more effectively as far as process is concerned and so improve the performance of the whole group.

When you make process interventions in future meetings of that group, you are more likely to get an understanding and patient reception and a positive response.

PAPER 13

HOW TO INFLUENCE GROUPS

The influential group member needs first of all to be aware of what is happening in the group. A heightened awareness of group processes makes it easier to influence those processes in the direction required. A group member who is clear about what is going on in her group can influence that group even if she is not the leader.

What to look for in groups

The first requirement is to learn to distinguish between "content" and "process".

CONTENT: Content deals with the subject matter or the task upon which the group is working. In most groups, the focus of attention of all members is on the content.

PROCESS: Process is concerned with what is happening between and to group members while the group is working. Process deals with such factors as morale, feelings, atmosphere, influence, participation, leadership, conflict, co-operation, etc.

Very little attention is paid to process, even when it is the major cause of ineffective group action. Sensitivity to group process will better enable one to diagnose group problems early and deal with them more effectively.

Having decided to pay attention to group process, the second requirement is to distinguish between "task" process and "maintenance" process.

TASK PROCESS: Task process in a group is any behaviour which is primarily trying to get the group task accomplished. Here are some examples:

Initiating: Proposing tasks or goals; defining a group problem; suggesting a procedure or ideas for solving a problem.

Seeking information: Asking for facts; seeking relevant information; seeking suggestions or ideas.

Giving information: Offering facts; providing relevant information; stating a belief about a relevant issue; giving suggestions or ideas.

Clarifying: Interpreting ideas or suggestions; clearing up confusions; defining terms; indicating alternatives and issues.

Summarising: Pulling together related ideas; restating suggestions after the group has discussed them; offering a decision or conclusion for the group to accept or reject.

Other task process behaviours include planning, timing, making lists of information, checking progress and reporting group results.

MAINTENANCE PROCESS: Maintenance is any sort of behaviour which helps the group to remain in good working order. Maintenance is about creating a good atmosphere for working on the task and about creating good working relationships within the group. Here are some examples:

Harmonising: Attempting to reconcile disagreements; reducing tensions; getting people to explore differences.

Gate keeping: Helping to keep communication channels open; making sure everyone participates; making sure ideas are heard and discussed.

Encouraging: Being friendly, warm and responsive to others; indicating by remark or facial expression the acceptance of another person's contribution.

Developing ideas: Listening to other people's ideas, supporting them and developing them further.

Giving feedback: Letting other group members know how you value their contribution to the group.

In order to ensure that your maintenance contributions are worthwhile and influential it is necessary to have an understanding of the emotional issues that underlie most group activity.

Emotional problems in groups

There are many forces active in groups which disturb work, which form an emotional undercurrent in the stream of group life. These undercurrents produce behaviour which can make it difficult for the group to function. Groups often ignore such issues or wish them away. The effective group member will recognise such issues and then encourage the group to discuss and deal with the issues openly, thus removing the block to its progress. Here are some examples of emotional issues:

Identity: Who am I in this group? Where do I fit in? What kind of behaviour is acceptable here?

Goals and needs: What do I want from this group? Can group goals be made consistent with my goals? What have I to offer the group?

Power: Who will control what we do? How much power and influence do I have?

Intimacy: How close will we get to one another? How personal? How much can we trust one another?

Here are some examples of the sorts of destructive behaviour which these emotional issues can produce:

Counterdependency: Opposing or resisting anyone in the group who represents authority.

Dominating: Asserting personal dominance; attempting to get one's own way regardless of others.

Withdrawing: Trying to remove the sources of uncomfortable feelings by not contributing for long periods and psychologically leaving the group.

Pairing up: Seeking out one or two supporters and forming a kind of emotional subgroup in which the members protect and support one another.

Behaviour which influences groups

Here we are looking for behaviour which favourably influences a group, which helps it forward in the accomplishment of its task. We are also looking for behaviour which makes an individual group member significant to that group, and able to control to some extent the direction of the group's movement and its final result.

First of all, you can become significant to the group by observing what is happening in the group in terms of process, and by making contributions to the group at the process level. This includes both task and maintenance process, and all the behaviours described under those headings are relevant.

There are, however, certain of these process behaviours which are particularly powerful in taking a group forward. The group member who includes these in her repertoire will become more influential. These behaviours are

- clarifying
- summarising
- encouraging
- developing ideas.

The group member with her own ideas to contribute to the content may or may not be influential, depending on her group skills. The group member who listens out for and encourages, clarifies and develops ideas, and then summarises at certain points is certain to be influential in that group.

For demonstration use for Paper 13, "How to influence groups".

TASK

INITIATING

GIVING/SEEKING INFORMATION

- ● CLARIFYING
- ● SUMMARISING

PLANNING

TIMING

CHECKING PROGRESS

MAINTENANCE

HARMONISING

GATE KEEPING

- ● ENCOURAGING
- ● DEVELOPING IDEAS

GIVING FEEDBACK

PAPER 14

HOW GROUPS WORK

This paper is designed to arm you, the trainer, with information about group behaviour so that you can better handle groups that you have to train.

After reading this paper, you will be able to

- state the 5 stages of group development and the differences between those stages;

- plan your training activities to take account of these stages, particularly the first stage;

- plan seating arrangements to take advantage of the way they affect

  - the flow of discussion,
  - leadership patterns;

- state the consequence of increasing group size.

How groups change

Groups are not static. They change and develop over time as the group members adjust their feelings and behaviour towards one another. The trainer who can predict the stages that her group is likely to go through can plan her training programme to take advantage of these changes.

There are five distinct stages that a group goes through:

Stage 1 - Formation

The first stage brings a group of strangers together and is characterised on the surface by formality. Group members will often

- address each other formally

- be uncharacteristically quiet

- obey unquestioningly rules set for them

- return to the same seat after refreshment break

- accept and desire authority from the trainer.

Stage 2 - Exploration

As group members start to get in touch with one another, they behave formally at first. The reasons for this formality become clearer when we consider the feelings of the group members. Each of them is feeling insecure, anxious and uncertain about the other group members. When people are insecure, they tend to do whatever makes the situation more predictable because this will reduce the uncertainty - hence the desire for rules and procedures, a fixed seating pattern, etc. Most people do this unconsciously, without intent.

Take note of who becomes the informal leader in stage 2. You may be able to use her to help you achieve some training objectives.

Stage 3 - Competition

Each group member now starts to jockey for position in the group and establish her place and status.

Do not attempt to introduce formality or authority into the group when it has reached either stage 2 or 3. At the least, this will cause confusion, and at the worst, you may be rejected.

Stage 4 - Co-operation

This stage sees a resolution of any conflicts that may have arisen, and an orientation to get the group task done.

Stage 5 - Discipline

Once the group is involved in a task, members tend to subjugate their individual interests to the interests of the group and to getting the task done.

Seating arrangements within the group

Seating arrangements usually affect the behaviour of a group:

- the most centrally situated member of a group is likely to emerge as the group leader;

- leaders are most likely to emerge on that side of the table around which the fewest participants are seated.

- When communication is free:

    - the maximum number of communications will be made between people seated opposite one another;

    - the minimum number of communications will be made between people seated side by side.

In other words, communication will tend to flow across rather than around the table.

Thus seating arrangements do affect the flow of discussion, and this, in turn, influences the emergence of leadership pattern within the group.

Teachers and instructors can use these findings to advantage. Shy, retiring students can be seated in positions which are likely to encourage them to contribute more than they would under normal circumstances. Talkative, out-going students can be seated in positions which are likely to limit the number of contributions they are able to make. Furthermore, teachers and instructors can ensure, to a certain extent, who will exercise the leadership function, by positioning a student in the centre of the group and on the side of the table around which the least number of participants are seated.

Consequences of increasing group size

Generally speaking, research demonstrates that the size of a group does have a number of other important consequences. All other things being equal, the larger the group

- the greater the demands upon the teacher and the less the demands upon the student to make use of her skills;

- the greater the group's tolerance towards direction by the teacher-leader, the more differentiated she becomes from membership of the group as a whole - in other words, the participation of the individuals is diminished.

PRACTICAL SESSION - PARTICIPANT PRESENTATIONS

Objectives	Tutors: 1. To outline the principles involved in effective presentations. 2. To enable participants to learn about their strengths and weaknesses in lecturing by actually doing it and getting feedback. 3. To build up the confidence of participants. 4. To enable participants to develop new more effective approaches to lecturing. Participants: 1. To demonstrate their understanding of the principles of effective presentations by practical exercises. 2. To practise (and gain confidence in) using new approaches to lecturing.	
Document	Paper 15: "The Lecture Method".	
Time	2 hours 20 minutes	
Method	Presentation in small groups by tutors. Individual lectures to small groups. Feedback.	
2 hrs 20 mins	**Participant Presentations** Divide the workshop into subgroups. Each group tutor explains that the participants are going to make short presentations (15 minutes each) to brush up on their techniques of lecturing. The first presentation will be just before lunch today and the other four will be on Day 9 in the morning session. Participants therefore have most of the morning to prepare their content and training aids with guidance from the tutor. Each tutor should go over with her group the principles of effective presentation based on Paper 15, "The Lecture Method".	They can choose any subject they like - preferably one they use and present in lecture form in training courses. Some guidance in selecting a topic may be needed. Tutors may also need to give guidance on timing, i.e. some participants may plan to do too much in the 15-minute slot.

40 mins	One lucky participant gets to give her presentation at the end of this preparation session. After the presentation the rest of the group and the tutor give her feedback.	
	The rest of the presentations then follow. After each presentation of 15 minutes, allow 25 minutes for feedback from the group and the tutor.	Feedback should be supportive but very honest.

PAPER 15

THE LECTURE METHOD

The aim of this paper is to

- present research findings on the effectiveness of the lecture method of training;

- enable course members to decide when lectures will be effective for training and when they will not be;

- enable course members to choose the most effective ways of presenting lectures.

Research findings on student retention of lecture materials

The main purpose of the lecture in modern higher education is to

- provide a survey of a field of knowledge through the medium of a living personality;

- relate this knowledge to some human objective;

- arouse an active interest, leading to an independent comprehension of the subject by the listener.

The main defect of the lecture system is that there is no guarantee that these purposes are achieved. The research findings overwhelmingly support this point.

A. THE NORWICH EXPERIMENT

The main objective of this experiment was to determine how much lecture content students carry away with them, either in their heads or in their notebooks. The students were instructed to treat the occasion as a normal college lecture on which they were to be examined. Not only were they allowed to take notes, but they were also supplied with a duplicated blackboard summary after the lecture.

Experimental Results: Students were able to carry away in their heads and in their notebooks not more than 42% of the lecture content. These students were tested immediately after hearing the lecture, making maximum use of memory aids. The test used was confined mainly to the recall of the kind of information students would readily make a note of.

The students were tested again a week later. At this stage, they could recall only 17% of the lecture content. In other words, they had lost more than half of what they recalled immediately after the lecture.

General Conclusions: Students listening to an uninterrupted discourse within their range of understanding, taking notes as usual, carry away only about 40% of the

- factual data

- theoretical principles

- general applications of the material.

A week later, they have forgotten at least half of this material. But there are wide differences between the best and the worst cases - of the order of 3:1.

B. THE JONES EXPERIMENTS

Jones (1932) conducted one of the first studies on the effectiveness of lectures. In his experiments, he involved 782 psychology students in 30 lectures, using 5,000 questions to test retention.

1. Tests of immediate memory of lecture. He tested students immediately after the lecture to see how much of the lecture material they had retained. He found that an average of 62% was retained but that there were wide differences between students.

2. The "curve of forgetting". He found that there was a curve of forgetting, starting at about 60% on immediate recall and declining to 20% after 8 weeks.

3. Experiments on how to improve a lecture. Note-taking made no difference to the amount retained.

Retention was improved by

- short, multiple choice questions on the lecture content 5 minutes before the end of the lecture;

- increasing the forcefulness, dramatic appeal and quality of the lecture;

- reducing the number of points covered;

- going at a slower speed;

- increasing the number of concrete illustrations.

4. Is the lecture the best teaching method for most students? No! Jones found individual differences in retention ranging from 0 to just under 100%. This, he concluded, showed that the lecture method suited only the upper 10% of the group.

C. LLOYD'S EXPERIMENTS ON TAIL-OFF OF PERFORMANCE DURING THE LECTURE PERIOD

Both the performance of the lecturer and the receptivity of the student go through the following phases:

- an initial spurt in performance or output very near the beginning of the lecture;

- a middle sag due to boredom and fatigue;

- an end spurt which pushes performance back to its initial level.

If the lecture is much longer than one hour, this "spurt-sag-spurt" pattern repeats itself within the overall context of decreasing performance.

Summary

Many studies have been made into the effectiveness of the lecture method. The results of these studies have been generally similar to those reported in this paper.

The lecture method is not the best teaching method for most students. Only a small percentage of the most able students seem to benefit from this method. Discussions and other participative methods prove to be more popular and effective with the majority of students.

TRY TO AVOID USING THE LECTURE METHOD MOST OF THE TIME.

How to improve the effectiveness of the lecture

If, despite the foregoing, you decide that the lecture method is the only way or the best way to achieve your teaching objectives, the following factors will improve your performance and help your audience to retain more of the content:

1. Vary your presentation. A varied presentation with visual aids and demonstrations will reduce the boredom of the audience.

2. Compensate for the tail-off in the middle part of the lecture. The main problem with a lecture is the middle "sag", lasting up to 40 minutes and caused by boredom and fatigue. The lecturer who uses her ingenuity to devise a variation of activity during this middle sag will probably maintain the interest of her audience throughout.

3. Ensure in your introduction that the group finds the subject relevant and interesting. If you convince the audience at the start that they will benefit from listening to you, they will try much harder. A few well-chosen words, delivered with enthusiasm, will achieve this more easily than a rambling, complicated introduction.

4. Choose a pace of presentation which suits the audience. If you try to force them to think too quickly they may not think at all.

5. Use dramatic appeal. Put some expression into your voice and you will sound more interesting. Emphasise some words or points, and say others more quietly. Throw your voice to the back of the room. Use illustrations from real life wherever possible. Also, look at the audience; an expressive face can be a very good visual aid.

6. Choose a time of day when students are alert and fresh. Try to avoid giving lectures after lunch or late in the evening.

Conclusions

A lecture can be made more interesting by the use of visual aids, demonstrations, discussions or any other teaching activities which create variety for the audience. Boredom and fatigue are the two greatest pitfalls of the lecture, but they can be overcome by an imaginative presenter.

FACILITATING, COUNSELLING AND NON-DIRECTIVE WORK

Objectives	Tutors: 1. To establish the guidelines for use by trainers in dealing with adults learning by experiential methods where they are taking responsibility for their learning. 2. To model the behaviour required for participants. 3. To give participants a chance to practise the skills so that they can evaluate them as possible tools for themselves. Participants: 1. To demonstrate an ability to counsel and assist colleagues, clients and others to solve problems or deal with conflicts. 2. To demonstrate an ability to facilitate group and individual work.
Documents	Paper 16: "The Tutor as Facilitator". Paper 17: "Non-directive Interviewing".
Time	3 hours 30 minutes
Method	Presentation to subgroups by tutor. Demonstration of counselling to subgroup. Individual exercises and feedback. Demonstration of non-directive interviewing to group. Individual exercises and feedback. Presentation on facilitating to group by tutor and discussion.
30 mins	This session is conducted in the subgroups. The tutor gives a presentation on counselling based on Paper 16. She then demonstrates briefly with a group member who is willing to talk about a problem.

1 hr	Each other group member practises counselling in turn. After each counselling practice the counsellor receives feedback from the rest of the group and the tutor.	Allow 10 mins for each practice and 10 mins for feedback after each round.
30 mins	The tutor then gives a presentation on non-directive work based on Paper 17, "Non-directive Interviewing". She then demonstrates the technique with a willing group member.	
1 hr	Each group member practises non-directive interviewing in turn. After each practice the interviewer receives feedback from the rest of the group and the tutor.	Usually participants find this quite difficult as they are often used to being more directive.
30 mins	The tutor then gives a presentation on facilitating, explaining that it is based on the skills of counselling and non-directive approaches. She then leads a discussion on when to be a facilitator and when not to be and how to be an effective facilitator. This is to be a more general presentation and discussion than the first two presentations, which are based on more specific skills.	Identify sessions on course when tutors have been facilitating.

PAPER 16

THE TUTOR AS FACILITATOR

Counselling and problem solving form a part of every tutor's job. Even if most of your teaching is in structured and directive situations, there will be occasions when a non-directive, counselling approach will be the one most likely to help the trainee to solve her problem or achieve the learning which is eluding her.

What do we mean by a "non-directive approach"?

When a tutor is being "non-directive" she is deliberately avoiding giving advice or instructions. Instead, she is helping the trainee with the use of questions, reflecting back and counselling techniques to come to her own decisions about the solutions to problems or learning goals. When a tutor is acting in this non-directive way she is called a "facilitator" because she is facilitating or helping the trainee to decide on and achieve her own goals.

What are the techniques which a facilitator uses?

1. The facilitator needs to create an atmosphere of trust and acceptance which will enable the trainee to say all that she needs to say in order to see the problem clearly. This is aided by the facilitator's having an uncritical regard and honest respect for the other person and making sure that she sees this.

2. You will probably have to ask questions either to clarify the situation or to help the trainee to see the situation in a new light. Your listening to the answers should be non-evaluative; you want to help the trainee to evaluate for herself, not to improve your own judgements.

What are the stages in a facilitating approach to problem solving?

1. Identifying the problem. This requires open-ended questions which allow the trainee to explain her problem, listening, and not advising or judging. Give the trainee time to think and express herself; silences, summaries and reflecting back will help. Reflecting back key phrases should draw her into further expansion of the issues she is raising. For example:

   Trainee: You see, I've not been getting on well with my boss (pause) she doesn't understand .... (silence).

   Facilitator: She doesn't understand?

   Trainee: What I mean is she doesn't think my family should take priority over my work.

   Facilitator: What do you think about that?

2. Exploring the conditions under which the problem occurs. The "conditions" include the feelings of the trainee whose problem it is. These feelings are facts. By allowing the trainee to reveal to herself what her feelings are, she will come to accept her own part in the problem.

3. Solutions to problems. Solutions will only be real if the holder believes in them. She is most likely to believe in the solution if she suggests it herself. She should therefore be encouraged to do so. The facilitator's main aim in this non-directive approach is to get the trainee to evaluate her own solutions rationally.

When should the trainer use a non-directive approach?

This sort of approach works best with small groups or individual trainees. Whenever an emotionally sensitive issue arises the approach will be valuable. Sometimes the trainer will notice that these emotionally sensitive issues are "lurking" under the surface, causing tension, and she may then start facilitating by bringing them into the open herself. A counselling, reflecting back approach as illustrated in this paper is particularly useful in defusing and working your way through conflict, whether that conflict is directed at another trainee or at yourself.

PAPER 17

NON-DIRECTIVE INTERVIEWING

Introduction

Non-directive interviewing (NDI) is a technique for use with respondents in an emotional state. It has two purposes:

- to relieve emotional tension so that the respondent can then contribute rationally;

- to gather information, particularly that concerning the source of emotion.

Relief

People who are in a highly emotional state have to become calm and rational before they can think objectively and can collaborate sensibly. It does not much matter whether the emotional state is euphoric or distressful. Until the euphoria passes or the distress has been relieved, little useful progress can be made. While the tension remains bottled up, its cause or stimulus will continue to "play the record" round and round in the respondent's mind. To break the circle, it is necessary for her to talk about it and probably to exhibit some of the distress-discharging behaviours, such as laughter, sweating, shaking or sobbing. These behaviours relieve the tension; the ensuing talking allows the respondent to re-evaluate the stimulating experience in her own mind, to get it into perspective and to decide what she will do about it. A well-known example of distress is the sobbing which is necessary to discharge the distress of a bereavement. This behaviour is regarded as socially acceptable and it is therapeutic. But it is just as proper and as therapeutic to encourage and secure distress-discharging behaviours when, for example, the respondent is frightened, frustrated or angry — a condition not uncommon among managers.

Method

There are three overriding conditions for successful NDI:

1. The respondent must feel that her material is in safe, confidential and responsible hands.

2. The interviewer must give no directions or advice.

3. The interviewer must give no comment or evaluation of the material.

Safety

To make the client feel safe, the respondent should receive as early as possible in the interview, and as often as necessary thereafter, reassurance that the interview is entirely private between the interviewer and the respondent. There will be no disclosure whatsoever of the material or its source.

Reassurance

During the interview the interviewer should reassure the respondent by the constant warmth of her gaze, and she should maintain eye contact, unflinchingly, for at least 95% of the time. These are essential and simple techniques, but they are never felt as "techniques" by the respondent, who probably feels that she has seldom before received such patient and understanding attention. This friendly acceptance is the main method of getting the respondent to talk and to "discharge".

Directions

No good is served if the respondent learns that she can rely on the interviewer for the course the interview should take. The interviewer wants to hear what is going on in the respondent's mind, not what is in her own mind. Therefore let the respondent talk about her concerns. Make it clear that there is "all the time in the world". Avoid interruption while the talk continues. If there is prolonged silence, let it continue; few people can maintain silence for more than a minute. Some directions are worthwhile if the respondent veers away from material which is obviously distressful to her. It is worth bringing her back by some remark such as "I didn't understand fully about .... Could you go over it again?" The normal way to get people to continue talking on their distress topic, or to bring them back to that topic when they have veered off it, is to use "stimulus" words taken from their own comments.

Evaluation

There must be no "evaluation" in any of the comments of the interviewer. Such evaluation will prompt the respondent to listen consciously to what the interviewer has to say, and will consequently kill her train of thought on the much more important subject of her own distress. There will be many occasions when her distress is so painful or embarrassing that she wishes to come off the subject. Try to get her to return to it, until it is obviously fruitless, or until there has been ample discharge. The respondent will know when there is no more to come.

In any case, an outsider's evaluation is of no use to the respondent because distressful experience cannot be re-evaluated or reinterpreted and brought into perspective except through the logical mental processes of the respondent. Given the opportunity and the time, she is capable of these processes. She is unlikely to accept an evaluation by the interviewer as a step in this process. It requires a mind in a highly rational state if one is to give due weight to the advice of somebody else.

Distress-discharging behaviour

Some discharging behaviours are considered acceptable: animated talking, laughing, yawning, for example. Some are not: such as crying, angry noises, violent movement, shaking, sweating. They are rare but not totally absent, in the experience of most counsellors. All such behaviour is helpful in relieving tension; if there is evidence of it, it should be encouraged.

If it occurs and is then inhibited because it "isn't done", the counsellor should reassure the respondent that it is perfectly acceptable to her, and should endeavour to prolong it by restimulation whenever possible.

Applications of NDI

NDI is an important technique, useful to prepare the way for ordinary information collecting, problem-solving and decision taking. It can be used with people who are in an emotionally charged state and whose contributions would not otherwise forward the project. A period of NDI can proceed an orthodox fact-finding or problem-solving interview, the counsellor moving the respondent from one stage to the next without any formal break. Conversely, the counsellor can adopt an NDI mode if she finds during an orthodox interview that the respondent has become emotional or is showing evidence of distress or of discharging behaviour.

HOW ADULTS LEARN

Objectives	Tutors: 1. To identify blocks to learning in adults. 2. To identify factors which reduce remembering. 3. To identify factors which reduce participant attentiveness. 4. To identify ways of overcoming these barriers to learning. Participants: 1. To apply the principles of learning to training programmes.	
Document	Paper 18: "How Adults Learn".	
Time	1 hour 30 mins	
Method	Brainstorming in small groups. Plenary discussion on small group results. Presentation by tutor to whole group.	
30 mins	This session starts in the subgroups where newsprint answers to the following questions are prepared: What are the main blocks to learning in adults? What are the main factors which cause lack of attention and concentration in the "classroom"? How do we reduce the tendency of participants to forget what has just been heard in a lecture?	The tutors may need to prompt and guide these discussions.
40 mins	A spokeswoman is chosen in each subgroup to present these answers to the whole group. After each presentation the course director leads a discussion.	
15 mins	Coffee break.	
20 mins	The course director gives a brief presentation on "How Adults Learn", based on Paper 18.	

PAPER 18

HOW ADULTS LEARN

The trainer who works with adult groups often finds that much of her effort and skill is wasted because her audience forgets so much of the material she has presented so quickly. This paper looks at the principles involved in adult learning and some of the major blocks to learning, and suggests how to increase the ability to learn by use of training techniques.

Learning is a complex process

There are a number of different aspects of what we commonly call learning:

- learning (committing to memory)
- remembering (recalling what one has learned)
- retaining (storing material until it is needed)
- recalling (retrieving memories which have been retained)
- recognising (an outside stimulus prompts a memory which was not available to active recall)
- forgetting (losing material gained by any of the above processes).

The lecturer should at all times be painfully aware that much of what she says is immediately forgotten by her students. In planning her session, she must decide which of her points are key points that really must "stick". She should then use methods suggested by this paper to ensure that these key points are remembered:

- present material in manageable quantities;
- make the material meaningful;
- motivate the learner to remember;
- encourage the learner to use the memory aids listed above;
- give the students a chance to review the material at the end of the session. It is best to ask them to read the lecture notes, then write what they can from memory.

A lecture planned to overcome the natural human tendency to forget is less likely to be a lecture wasted.

Barriers or blocks to learning

To the extent that it is acknowledged that all people have certain "blocks" to learning, it can also be said that the more of them that are present in the learner's psychological make-up, the less effective his learning and resultant behaviour is likely to be.

Below is a list of conceptual factors that are considered to be detrimental to everyday learning, some of which will inevitably be detrimental also to improved managerial and industrial behaviour.

1. Perceptual - Not seeing what the problem is, what may be wrong.

2. Cultural - Exposure to a given set of cultural patterns regarding what is good/bad, right/wrong, etc., causing a desire to conform, lack of imagination or questioning.

3. Emotional - Fear of making mistakes, taking risks, being made a fool of, desire for order and security, overmotivation to succeed quickly, inability to relax.

4. Intellectual - Inadequate use of intellectual problem-solving strategies, inadequate language skill to express and record ideas, etc.

5. Expressive - Poor communication skills (i.e. working in a foreign language) may inhibit the ability to communicate ideas or frustrate the student.

6. Environmental - Lack of a supportive atmosphere in which to work, lack of co-operation and trust from boss/ colleagues, lack of stimulation to develop ideas.

Teaching older students

Most older adults react badly to change and innovation. Sometimes they also relate learning to bad memories of school and classroom techniques.

Older people learn more readily by discovering things for themselves. They react badly to tell and do methods, such as following spoken or written instructions, listening to oral instruction, and reading books or papers.

Principles which help adult learning

1. Overlearning - Repetition by participants of principles being learnt, preferably in different ways. (Methods are group discussions, role-play, question and answer, problem solving, summarising.)

2. Multiple sense learning	-	Using all the senses. Eyes are most effective.
3. Active learning	-	Learning by doing, simulation, role-plays.
4. Feedback	-	Two-way communication between trainer and participants, e.g. sight, questions, etc.
5. Meaningful material	-	Presenting information which participants see as valid and useful - going from where they are at. Level of presentation must be right.
6. Primacy and recency	-	People tend to remember things heard first and last. It is useful to vary the learning pattern. The most important material should be presented in the first quarter of an hour and the last quarter of an hour. Summarise throughout and at the end. Present visuals and handouts.
7. Reinforcement	-	The reward principle encourages the student to remember. Feedback and approval from the tutor and vice versa. Body language and verbal language are important.

LEARNING BY DOING

Objectives	Tutors: 1. To outline the principles of active learning. 2. To enable participants to share their home experiences in practical training methods, and build their awareness of good and bad training methods. 3. To enable each participant to develop new, more active approaches to training through practical work. Participants: 1. To produce an effective presentation of a learning-by-doing exercise. 2. To develop the skill of giving constructive feedback to other participants.
Document	Paper 19: "Learning by Doing".
Time	30 minutes
Method	Presentation to whole group. Demonstrations to small groups. Feedback.
30 mins	A short presentation by the course director to the whole group on the principles of learning by doing. She then demonstrates by teaching the whole group how to shuffle a pack of cards: 1. by telling people how to do it and then seeing if anyone can do it after listening to the instructions (they won't be able to); 2. by letting participants practise after each stage is explained - which is learning by doing.

PAPER 19

LEARNING BY DOING

It is often possible to teach by devising a game or exercise from which the student can learn certain points for herself. The fact that she has made the discoveries for herself usually means that she does not forget afterwards what she has learnt. Sometimes you can use exercises already in existence which need only a little modification to be made suitable.

Students usually enjoy themselves more if they are active participants rather than passive listeners. However, a "learning-by-doing" session needs to be conducted skilfully, otherwise it can lead to frustration. Here are some guidelines for conducting a successful session:

1. Invent or choose a game or exercise which will achieve the objectives you have set. There is no need to find an exercise which achieves all of your objectives. A variety of teaching methods may be needed in any one session.

2. At the start of the session tell the students what they will learn from the exercise so that they know what to aim at. Also give them all the information they need for doing the exercise. Be sure that they understand what is required of them.

3. Give guidance to any individuals having trouble with the exercise.

4. Give immediate feedback to students on their performance. Knowledge of results is a great aid to learning.

5. Some exercises are so designed that the student makes all the necessary discoveries for herself. Usually, however, the trainer needs to guide the student's attention towards the important lessons to be drawn.

6. At the end of the exercise get the group to discuss the points they have learnt. These should be summarised and listed on a visual aid as a way of reinforcing the learning.

Emotional problems in groups

Identify goals and needs of individuals: power, intimacy. Destructive behaviour produced by these emotional issues.
Counterdependency: dominating, withdrawing, pairing up.

Behaviour which favourably influences groups

Clarifying
Summarising
Encouraging
Developing other people's ideas.

NEGOTIATING

Objectives	Tutors: 1. To teach participants the principles of effective negotiation. 2. To show the necessity for preparation. 3. To show how well-conducted negotiations can help both sides to feel they have won, and the converse for badly-conducted ones. Participants: 1. To enable participants to practise negotiating skills in a supportive atmosphere and to learn how to apply principles of effective negotiation to their individual training situations.
Documents	Navel orange exercise. Paper 20: "Negotiating".
Time	2 hours
Method	Paired negotiating exercise. Whole group discussion. Presentation to whole group on negotiating. Small group negotiating exercise.
30 mins	Divide the group into two and give one group the "Company X" paper and the other the "Company Y" paper. Ask all participants to read their paper, and then find someone from the opposite group to negotiate with. Participants have 5-7 minutes to negotiate, then rejoin the whole group. The tutor then asks each pair to report on their negotiation, and leads a discussion about the results.
15 mins	The tutor then talks to the whole group on negotiating based on Paper 20, "Negotiating".

15 mins	Divide the course into subgroups with at least 6 people in each subgroup for the negotiating exercise.	
	Divide each subgroup into two negotiating halves (3 people or more per half). The tutor collects a sum of money from each person and keeps it during the exercise.	The size of the sum of money to be decided jointly by all the tutors.
30 mins	Send each negotiating half away to prepare to negotiate with the other half on what is to be done with the money.	
15 mins	Bring the halves together for their negotiations. The tutor makes observation notes.	If anger and hostility surface, the tutor should talk about it calmly and not evade the issue or get angry herself (if possible).
15 mins	After the negotiations, give the group the money to use as they have agreed. Give them feedback on the effectiveness of their negotiation practices.	

COMPANY X

You are negotiating on behalf of your company with a research organisation which thinks they have discovered a cure for a virus that has in the last few weeks killed or seriously crippled a number of young children in your community.

Your company must have the juice of 2 tons of navel oranges to make the serum required to cure this disease.

Company Y says that they also have a cure, and they also require 2 tons of navel oranges.

Unfortunately, there are only 2½ tons of navel oranges available in your country. Because of quarantine procedures from neighbouring countries, no more navel oranges will be available for the next month. By that time, the disease may have killed all the children in the country.

Your company is convinced that your cure is more effective than that of Company Y.

Negotiate for the 2 tons of oranges.

COMPANY Y

You are negotiating on behalf of your company with a research organisation which thinks they may have discovered a cure for a virus that has in the last few weeks killed or seriously crippled a number of young children in your community.

Your company must have the skins of 2 tons of navel oranges to make the serum required to cure this disease.

Company X says that they also have a cure, and they also require 2 tons of navel oranges.

Unfortunately there are only 2½ tons of navel oranges available in your country. Because of quarantine procedures from neighbouring countries, no more navel oranges will be available for the next month. By that time, the disease may have killed all the children in the country.

Your company is convinced that your cure is more effective than that of Company X.

Negotiate for the 2 tons of oranges.

PAPER 20

NEGOTIATING

Stages in the bargaining process

1. Set your objectives

This is the overall settlement you would ideally like to achieve.

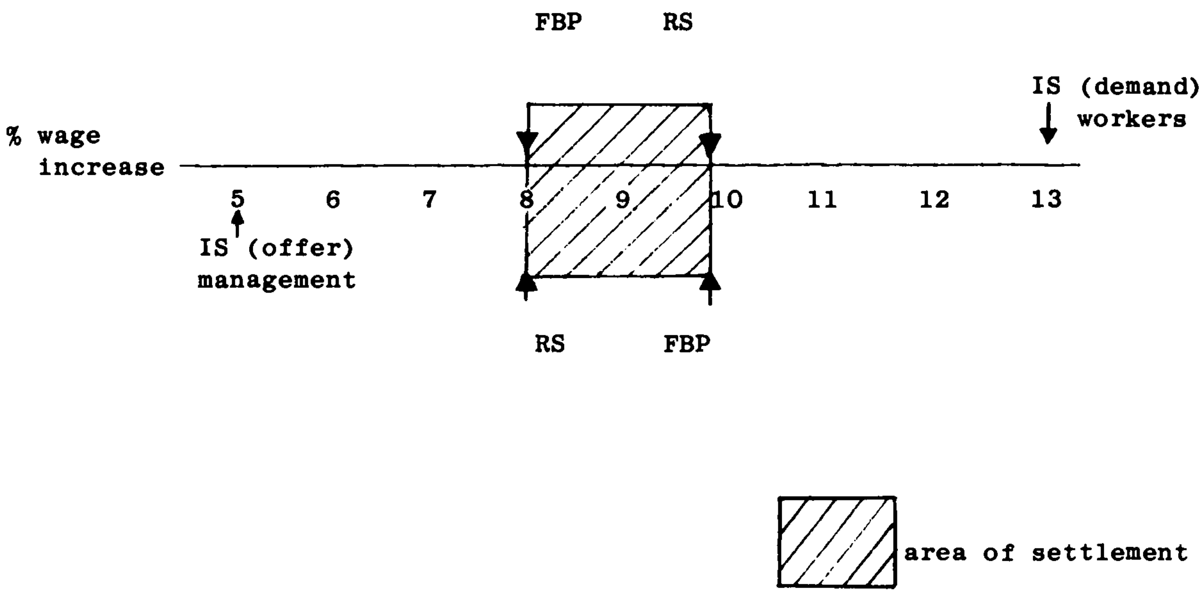
2. Assess your bargaining power

How much power do you and your opponent have? If you do not have enough power to achieve your overall objective, you will need either to change or modify your objective or see if you can get more power before you start negotiating.

3. Draw up a series of detailed objectives

For each issue to be negotiated you should have three objectives or settlement levels: an Ideal Settlement (IS), a Realistic Settlement (RS) and a Fall Back Position (FBP). Where you set these will be based on your assessment of your power.

This diagram will show you how these levels work in the field of wage bargaining:



In this example there is a happy overlap between the two sides' positions and they should have no difficulty in settling. If there were a gap, the area of settlement would still be bounded by the two Fall Back Positions, but settlement would be harder to reach as either or both parties would have to lower their sights. Although the example concerns wage increases, the same principle applies to any issue where there is a range of possible settlements.

The initial demand and the initial offer are crucial, because they set the boundaries for bargaining. In general a large demand has advantages (it allows room for bargaining, there is no risk of achieving less than your opponent was ready to give), but it can lead to confrontation. The counter offer should be pitched, where the demand permits, to allow the expected area of settlement to be reached by equal movement. There can, however, be advantages in seeking to move your opponent from her initial position before making a counter proposal.

4. Prepare a case

This should be based on the Ideal Settlement and provide clear support and justification organised around a central theme. It is often best not to reveal the full strength of your case at once.

5. Prepare to negotiate

Decide on strategy and tactics - e.g. opening moves, sequence of issues, linkages between issues, when to release information. Decide on membership of negotiating team and what role each should play. Brief everyone else in your negotiating team.

6. Negotiate

a) Clarify your opponent's position - use whatever information sources are available to discover her Realistic Settlement and Fall Back Positions. In the negotiation itself, ask questions.

b) Structure your opponent's expectations - undermine her credibility and the strength of her argument while increasing your own.

c) Get movement - your opponent should:

   (i) be aware that she cannot hold her original position;
   (ii) believe that you will offer some counter movement; and
   (iii) be able to move away from her original position without loss of credibility.

d) Closure - record what action is required, who is responsible and what time limits apply.

The skills required

Many different lists of skills have been produced, none of which is the final answer. It is evident, however, that two main types of skills are involved: diagnostic and social. Diagnostic skills include analysis of the issues, of your available power, and of your opponent's as well as your own strategy and development of objectives. Social skills include: listening, questioning, presenting information/proposals, influencing, managing a team, concealing feelings.

There are interesting differences in planning and negotiation behaviour between skilled and unskilled negotiators, according to some research:

1. Planning - skilled negotiators:

   - gave more attention to common ground, though both groups concentrated on areas of conflict;

   - explored a wider bargaining range, rather than planning around a fixed point;

   - planned issues separately, rather than in a predetermined sequence.

2. Behaviour - skilled negotiators:

   - avoided using "irritators" - "a generous offer", etc;

   - less often made immediate counter proposals;

   - avoided defend/attack spirals - attacks were fast and hard;

   - did not "dilute" their arguments;

   - tested understanding and summarised more;

   - asked more questions;

   - gave more commentaries on feelings.

BUILDING SELF-CONFIDENCE 1

Objectives	Tutors: 1. To present participants with practical ways of building their own self-confidence and to enable them to impart this information to the participants in their training programme. Participants: 1. To display the following behaviour: - to have a direct, visible impact on others rather than functioning behind the scenes - to stop self-limiting behaviour such as allowing yourself to be interrupted or laughing after making a serious statement - to learn how to be forthright - to state your own needs and not back down even if the immediate response is not acceptance - to have the option of being invulnerable to feedback if the information does not come in a helpful way - to build support systems with other women and to share competence with women rather than compete with them.
Documents	Paper 21: "Some Thoughts on Assertiveness". Paper 22: "Instructions for Scripted Initiation". Paper 23: "Constructing an Image", Worksheets 1 and 2. Paper 24: "Skills Inventory". Tutor's Manual - Influence Skills for Women.
Time	3 hours
Method	Checklists and self-evaluation exercises. Presentation by tutors to subgroups. Speech-writing and presentation exercise. Discussion.

$1\frac{1}{2}$ hrs	This session is conducted in subgroups. The tutor makes a brief presentation on assertiveness, outlining the difference between assertiveness - standing up for yourself while acknowledging the rights of others aggression - standing up for yourself and ignoring the rights of others non-assertiveness - not standing up for your own rights. The tutor then presents some assertive techniques based on Paper 40* "Dealing With Conflict". She then leads a discussion to get group members to identify those techniques they think they could use.	
15 mins	Tea break.	
$1\frac{1}{2}$ hrs	The tutor asks each group member to write a speech she wants to make to an individual, as directed in Paper 22, "Instructions for Scripted Initiation". Give each group member a chance to read out her speech, and give her feedback on it. The tutor leads a discussion on assertive rights, based on the questions in Paper 21. The tutor then distributes two worksheets for each person to complete about herself.	
	"Constructing an Image", Worksheets 1 and 2. Participants should complete these at their own pace, with the tutor giving guidance only if requested.	If participants have not finished by end of session, ask them to complete them that evening.

* See page 203

PAPER 21

SOME THOUGHTS ON ASSERTIVENESS

Knowing what "I want" is an ongoing discovery and often difficult. Some possibilities are "I want to be taken seriously", "I want my money back", "I want to be included in the conversation", or "I want to leave". All require conviction.

The words "always", "never", "ever", "should", "ought" suggest a power play and put others on the defensive. Take them out of your vocabulary. When you hear one of them, acknowledge the "grain of truth" in what has been said, change "but" to "and", and respond.

The staff meeting was at 4.00 o'clock. You should know better.	It is unfortunate that I forgot the meeting and I'd like you to tell me what happened.
You're always late. Why can't you ever be on time?	I am late this morning. Sorry.

Ask for 100% of what you want 100% of the time. "I want....That's probably true, and I still want....I can understand that and I still want...."

Be willing to negotiate when your self-esteem is not at stake. Stop talking about what you don't want, and start asking for what you do want. Be specific.

When you feel "no", say "no" immediately. Clarify from an assertive stance only if you feel like it.

When you feel "yes" with some "no", say, "Yes, and I have some reservations. I need time to think it over. I'll call you tomorrow."

Assertive behaviour involves good eye contact, facial expression that is consistent with statements (e.g. don't smile when you are serious), and few qualifiers ("sometimes", "sort of", "a little bit", "maybe", etc.)

Manipulation (using guilt or fear to blackmail another emotionally) is frequently found in the following phrases:

You're so sensitive.
It's for your own good.
You're creating a scene.
You don't love me any more.
Why? (as a disguised accusation or statement).

Assertive checklist

1. How do you feel?

2. What would you usually do to avoid asserting yourself in this situation?

3. What do you want?

4. What is your worst (irrational) fear about the outcome of behaving assertively?

5. What are your rights in this situation?

6. Are you willing to negotiate to a compromise? (Ask for 100% of what you want. Do not ask for the least you are willing to settle for; this is not honest. Ask for what you want.) If your self-respect is not in question, you can be prepared to offer a workable compromise.

7. What do you say, how do you act?

   a) Let the other person know you hear her.

   b) Let the other person know how you feel.

   c) Tell her what you want (not what you don't want).

Remember that a manipulative (non-assertive) person tries to make others feel ANXIOUS, IGNORANT or GUILTY. The manipulator's basic tool is external "rules".

PAPER 22

INSTRUCTIONS FOR SCRIPTED INITIATION

Write a scripted initiation, lasting one minute or less - a "speech" you want to make to an individual in your life.

Introduction

Your opening should contain the following elements:

- how long you plan to talk;
- whether it is all right for the other person to interrupt you;
- under what conditions an interruption is all right;
- whether you will be willing or able to listen to a reaction or questions immediately, or whether you prefer to postpone (to some definite time) a dialogue;
- that you will use notes, and why (e.g. to make sure you say everything you've considered? say only those things you really mean? say what you have to say concisely? truthfully? clearly?).

Here is a sample opener: "I want to talk to you about something that has been (____) touchy between us (bothering me? on my mind?) for (____) (a while? two months?)

It will take (____) minutes for me to say what I have to say.

Because (____) it will be hard for me to say this (I feel very nervous right now? it feels important to me to be able to get it all out at once?), I do not want you to interrupt me until I have finished. When I have finished it is (is not) OK for you to respond/ask questions. (I will be willing to talk about this further, hear what you have to say) (____).

Because (____) I have given this serious thought (usually feel (____) upset? intimidated? angry? confused?) when I try to (____) discuss this (talk about this with you?), I have made notes. I plan to use my notes while I talk. I would like you to (____) try to hear me through (hear my feelings carefully? hear my idea with an open mind? understand that this is something I have been avoiding? holding back? untruthful about in the past?)"

For the purpose of this rehearsal, assume that you have already asked for and obtained a particular time or appointment to talk.

The technique is called "scripted initiation" because you initiate the conversation and you script what you want to say.

Content/initiation

You may use full text or an outline. Remember to limit the entire initiation to under a minute. The content of the initiation may be anything that will be useful for you to rehearse, and may be addressed to any person you like. Try to begin with an acknowledgement of the other person, then state your feelings, and conclude with what you want.

PAPER 23

CONSTRUCTING AN IMAGE - WORKSHEET 1

Characteristics and colour

Circle any words which already fit your self-image. The "colour" column contains words to make your self-description more accurate and more vivid.

I am:

dynamic
versatile
responsive
innovative
tactful
perceptive
discreet
successful
open
energetic
attentive to detail
confident
even-tempered
pioneering
competent
sensitive
a leader
objective
dependable
honest
reliable
creative

I am:

warm
trained
open-minded
firm
expert
talented
ready to participate
calm
imaginative
self-motivating
concise
a risk-taker

I have:

drive
courage of convictions
initiative
foresight
physical stamina
mental stamina
persistence/tenacity
good judgement
common sense
resourcefulness
orderliness
flexibility
energy

Colour words

exceptional
unique
mastery
strong
unusually good grasp
unusual
deft
lifelong
adept
uncommon
penetrating
highest
exceptionally broad
deep insight
astute
high level
diverse

CONSTRUCTING AN IMAGE - WORKSHEET 2: Example of one participant's personal workshops

I am/I have/I can

personal qualities:

handle difficult people effectively
sell ideas to senior management
musical knowledge and taste
good, trained, effective listener
co-ordinate effective press, radio and TV coverage
interview well
good teacher
readily establish warm, mutual rapport with subordinates
conduct public events and ceremonies
artistic talent
highly observant
discussion group and forum leadership
imagination and the courage to use it
establish priorities among urgently competing/conflicting objectives
good perception in human relations

policy:

train discussion leaders
plan for change
establish objectives
forecast
evaluate progress
deal with unpleasant situations
identify problems
get external support
solve problems
negotiate
delegate; discipline; supervise

special projects management:

plan, organise, co-ordinate
creative innovator
outstanding writing skills
think on my feet
organise procedures, compile guidebooks and manuals
lecture with poise before the public
run meetings

PAPER 24

SKILLS INVENTORY

To evaluate your strengths and weaknesses, rate yourself alongside each task/skill listed below:

CHECK:

Strong (High aptitude; well-developed skill; I do this often enough and not too often)

Medium (Not enough experience; not a lot of aptitude; so-so capability at present time)

Weak (Need lots of work on this one; do it too much/too little and must find better balance)

CHECK:

Priority for me; relevant to my growth

Not a priority for me; I don't care if I die before I improve this area; not relevant.

	STRONG	MEDIUM	WEAK	PRIORITY	NOT PRIORITY
Thinking before I talk					
Being comfortable with my educational background					
Thinking on my feet - articulate under stress					
Being brief and concise					
Understanding my motivation for working					
Understanding group process accurately (e.g. dynamics in meetings)					
Accurately assessing political climate					
Separating personal issues and work					
Good, trained, effective listener; listen actively to others					
Appreciating the impact of my own behaviour					
Being aware of my need to compete with others					

	STRONG	MEDIUM	WEAK	PRIORITY	NOT PRIORITY
Dealing with conflict and anger					
Building an atmosphere of trust and openness					
Readily establishing warm, mutual rapport with subordinates					
Helping boss/subordinates/others discover their own problems					
Asking direct questions					
Inspiring the manager's/subordinates' confidence in my ability to do the job					
Willing not to be needed by boss/subordinates/others					
Offering to find answers to questions					
Drawing others out					
Expecting boss/subordinates to use my solutions					
Helping subordinates generate solutions to their own problems					
Accepting the boss/subordinate definition of the problem					
Talking about money and increases without embarrassment					
Promising only what I can deliver					
Saying "no" without guilt or fear					
Resisting interruptions					
Working under pressure of deadlines and time limits					
Establishing priorities among urgently competing/conflicting objectives					
Setting realistic goals for myself (and subordinates)					

	STRONG	MEDIUM	WEAK	PRIORITY	NOT PRIORITY
Using high energy time for high priority activities					
Determining progress milestones					
Presenting my biases and theoretical foundations					
Working comfortably with authority figures					
Letting someone else take the glory					
Working with people I do not particularly like					
Working co-operatively, collaboratively, as part of a team					
Giving in to manager's restrictions and limitations					
Assessing personal needs that determine acceptance of a job, a new role					
Dealing with unpleasant situations					
Handling difficult people effectively					
Identifying problems and objectives					
Stating problems and objectives clearly					
Establishing standards/reviewing standards					
Summarising discussions, ideas					
Interpreting policy					
Selling my own ideas effectively					
Negotiating, compromising skilfully					
Helping manager/subordinates maintain a logical sequence of problem solving					

	STRONG	MEDIUM	WEAK	PRIORITY	NOT PRIORITY
Challenging ineffective solutions					
Describing how others solved a similar problem					
Admitting ignorance non-defensively					
Asking help from others					
Resource gathering, researching, arranging for expert consultations					
Eliciting external support					
Evaluating possible solutions critically					
Contributing various techniques for creative problem solving					
Organising procedures, guidebooks, manuals					
Delegating tasks and the responsibility to perform them					
Disciplining, criticising constructively and when appropriate					
Inspecting, reviewing work of others in helpful manner					
Attending to details					
Helping boss/subordinates/others make use of their strengths and resources					
Taking responsibility					
Changing plans when emergencies come up					
Planning for change					
Building and maintaining morale					
Requesting feedback about my work					
Controlling anxiety while performing my tasks					

	STRONG	MEDIUM	WEAK	PRIORITY	NOT PRIORITY
Intervening without threatening my manager/subordinates					
Intervening at appropriate time					
Admitting errors and mistakes					
Admitting my own defensiveness					
Musical knowledge and taste					
Co-ordinating effective press, radio and TV coverage					
Sophisticated maths ability					
Theoretical modelling					
Performance specifications analysis					
OTHER TASKS, SKILLS:					

BUILDING SELF-CONFIDENCE - 2

Objectives

Tutors:

1. To present participants with practical ways of building their own self-confidence and to enable them to impart this information to the participants in their training programmes.

Participants:

1. To display the following behaviour:

   - to have a direct, visible impact on others rather than functioning behind the scenes

   - to stop self-limiting behaviour such as allowing yourself to be interrupted or laughing after making a serious statement

   - to learn how to be forthright

   - to state your own needs and not back down even if the immediate response is not acceptance

   - to have the option of being invulnerable to feedback if the information does not come in a helpful way

   - to build support systems with other women and to share competence with women rather than compete with them.

Time

2 hours

Method

Role-play in small groups.

30 mins

Participants reassemble in the same subgroups as in the first session on building self-confidence.

The tutor asks each group member to go through her questionnaires and identify some learning needs in assertiveness which she would like to practise.

Then ask each person to spend a few minutes identifying situations in which they have or anticipate problems in being assertive.

Post each participant's learning needs on newsprint round the room. Refer to it in the feedback session.

1 hr 30 mins	When everyone is prepared, explain that they are going to do a series of role-plays as in the influence skills sessions. There should be one role-play at a time, and while it is going on the tutor and the rest of the group observe. Take one group member at a time and get her to describe her problem and give relevant background information. Find a suitable group member to role-play the other person.	
	Let the role-play continue for 5-15 minutes, the tutor and the rest of the group give constructive feedback, and suggest alternative approaches or words if appropriate. Give the participant a chance to do it again and again if necessary and helpful. All group members should role-play their problems.	This should be all very supportive.

FIELD TRIP

Objectives

1. To visit projects related to training activities for women.

2. To analyse the methods and effectiveness of the projects visited and produce an evaluation of them.

3. To identify factors which could be adapted for in-country use.

The tutor explains that participants will be visiting projects/training centres on the field trip, giving details of what they will be seeing. Participants will be expected to be able to analyse what they have seen, evaluate effectiveness and comment on philosophies and techniques seen in relation to their own programmes.

LEARNING REVIEW

Each group will report briefly to the whole group at the beginning of the following day:

1. what they saw (very briefly);

2. how effective it was;

3. what they learned.

REGIONAL AND OTHER TRAINING AGENCIES

Objectives	Tutors:
	1. To present information about regional training agencies which help women trainers with opportunities for training and data about techniques and training aids.
	2. To encourage recognition of the value of sharing information among trainers.
	3. To demonstrate the use of a panel discussion as a useful technique for imparting information in a painless way.
	4. To demonstrate timekeeping and other duties of a chairperson.
	Participants:
	1. To demonstrate questioning skills in discussion.
Documents	Handouts provided by panellists.
Time	1½ hours
Method	5-10-minute presentations by panellists from regional training centres. Discussion and questions.
	Each panellist talks for 5-10 minutes about the training programmes and information offered by their institution to women trainers, and participants then ask questions. The session is chaired by a tutor.
15 mins	Tea break.

TRAINING POLICY AND COSTING

Objectives	Tutors: 1. To encourage participants to tackle the task of budgeting. 2. To acquaint participants with the principles of costing so that they know how to go about it. 3. To establish the experience within the group of budgeting and development of training policies. Participants: 1. To share problems and solutions with other trainers. 2. To display an understanding of budgeting.
Documents	Paper 25: "Developing a Training Policy". Paper 26: "Costing and Evaluating Training".
Time	45 minutes
Method	Presentation to whole group. Discussion.
45 mins	Plenary presentation of training policy and costing based on Paper 25, "Developing a Training Policy", and Paper 26, "Costing and Evaluating Training". Empathise with everyone's lack of inclination to do budgeting, but explain that they are going to have to apply these principles in the session on planning on the last day of this workshop. Ask them to study the two papers that evening. Answer questions.

PAPER 25

DEVELOPING A TRAINING POLICY

People are subjected to training almost from the moment of birth. It is a process which underlies everything we do and think. Training may be formal or it may happen by experience. Learning by experience is a slow and arduous process. Humanity has taken several million years to develop in this way. It is only in the last few thousand years that there has been real progress in the development of civilisation. This development has happened and is happening at an accelerating pace primarily because of the increasing emphasis given to education and training.

Education is concerned with imparting knowledge; training with developing skill in the application of that knowledge. For all practical purposes the two can be regarded as synonymous.

Effective training

Training is concerned with improving work performance. This can only be done by improving people's skills, a skill being the ability to do something well. Skill is acquired through a combination of knowledge and practice. The practical experience can be gained artificially under simulated and controlled conditions or in a work situation. The skills required in organised human enterprises can be broadly divided into three main categories:

- people in relation to people - communication and the social skills;
- people in relation to machines - the technical skills;
- people in relation to systems - the administrative skills.

Knowledge underlies all three categories. The people concerned will always possess some of the knowledge needed. The role of training is to identify all the knowledge needed through an analysis of the skills required and to relate it by communication to the knowledge already held. Trainers must find the best possible ways of imparting the knowledge and developing the skills. The end product must be an improved ability to do something.

Principal stages

The training activity can be subdivided in the following way:

Basic aim - an awareness of the need for training.

Planning - knowledge of organisation's total policy;

- diagnosis of principal training problems;
- development of training policies which support the organisation's policy;

- preparation of training plans and programmes, integrated with the organisation's plans and programmes.

<u>Operating</u> - obtaining acceptance of the need for and the programme of organisational training;

- providing the training;

- getting the trainees to put their new knowledge and developed skills into practice.

<u>Controlling</u> - assessing the extent to which the planned programme and its targets are achieved;

- assessing the results of training;

- supplying information to management in order to improve both the planning and content of training.

<u>Policy formulation</u>

The formulation of policy is a planning process. Policy governs the way in which an organisation does things or should do things. Policy is the collective corporate thinking of an organisation.

The first task of the newly appointed trainer is to ascertain what the present and projected policies of her organisation are. It is also a continuing responsibility to keep herself informed of changes in total policy or direction throughout the whole of her career as a trainer.

The trainer who approaches the planning of training activities with preconceived ideas of what is needed will be in danger of developing unsound training policies.

Plenty of time, which may be quite lengthy if the problem is of any complexity, must be devoted to finding what is being done at present and how it is being done, as well as what is intended for the future. When this has been established, further time must be spent in appraising the human resources available both inside and outside the company at present and for the future.

A detailed appraisal of training needs can only be done in conjunction with the managers and those likely to be trained.

<u>Training policy</u>

In a new situation it is unlikely that training policy will have been developed in any great detail. It will stem from two main sources, which may be identical. First, the terms of reference given to the trainer, and second, her job specification. It will be her task to develop training policies within this framework that will meet the needs of the organisation both in the present and the future. These training policies will have to be within the constraints of the finance, accommodation, equipment, people and time available.

A good trainer is one who makes the best use of the resources under her control, but she must always be careful to be realistic and not attempt the impossible.

The principal areas of policy which the trainer will have to clarify in regard to her own activity are:

- the volume of training to be provided by principal categories;
- the allocation between internal and external sources of training;
- the form, content and methods of training to be used;
- the selection, recruitment and training of training staff;
- training needs assessment procedures;
- the records to be kept;
- the internal organisation of the training department;
- internal administration and operating procedures;
- planning, budgeting and control procedures; and
- training appraisal procedures.

Many of these policies will only be developed gradually over a period of time. What must be borne in mind, however, is that like all the other planning processes, policy must be flexible and must always be changed and modified to meet changing circumstances and conditions.

PAPER 26

COSTING AND EVALUATING TRAINING

Why cost training?

Two main factors account for the increasing interest in training costs:

1. Some governments, with a system of levies and grants, have encouraged managements to take a closer look at their training activities and in particular the cost of such activities. Where there is a cost-refund system of determining grants, an accurate determination of actual training costs is needed.

2. The growing awareness amongst managers of the role of training in urban and rural development. Training has come to be accepted as a specialist activity which, correctly used, can offer an organisation a positive pay-off in terms of increased profits, efficiency or whatever criteria are used for defining the organisational objectives. The costs involved in training and benefits accruing from it need to be assessed in order to determine whether or not this pay-off is worthwhile.

In other words, the training officer, or whoever is responsible for training in the organisation, will need to:

- know how much the training activity costs so that she can prepare budgets, control costs and claim any grants;

- demonstrate and quantify its value in order to justify giving training at all.

While you may be asked to draw up a training programme, in practice you may not be called upon to deliver a full costing of all elements involved in commercial or industry training programmes, such as overheads, wages and other payments, material costs and wastage. What you almost certainly will be asked to provide is an overall budget for the programme and smaller budgets for individual training courses.

Budgets are often used as an attempt on a manager's part to maintain control over a trainer's activities. If you are working in an organisation which is very aware of expenditure and interested in keeping costs down, you will probably find that the exercise of development and approval of the overall budget for training is difficult and takes a long time.

An important principle of this exercise is consultation. Never assume that you can get around the accountant. It is always sensible to go and seek advice as to how you should draw up the budget from the people who have to allocate the money. If you then meet obstruction, try someone else. But do not be afraid to ask for help if you need it.

You may also find that many people in your organisation disapprove of or don't understand the need for training. If you (and your colleagues) are doing a good job, your training will be challenging and creative - many people dislike change and find challenges very threatening, especially when their own attitudes are at risk. Tread gently and try to get them on your side.

Training costs

Items which you will need to take into account when preparing a budget for a training programme will include:

1. Travel - airfares or other travel costs for trainer and trainees.
2. Accommodation and meals.
3. Daily allowances for living costs.
4. Preparation and printing of materials.
5. Transport of materials and equipment.
6. Venue charges and refreshment costs.
7. Printing costs.
8. Purchase of equipment and stationery.
9. Training of trainer(s).
10. Salary of trainer(s).
11. Miscellaneous payments for trainer(s) - i.e. pension, etc.
12. Contingency funds.
13. Office overheads - typing, electricity, services, etc.

You will probably be able to add more items to this list.

If you are planning individual courses, items 1 to 6 will be the most relevant ones, depending on how detailed your budget needs to be.

It is always a wise practice to include a 10% "inflation" loading to cover the emergencies which can arise.

Evaluating training through budgeting

Some organisations use budgeting to evaluate the usefulness of training. In this sense, budgeting is an attempt to ensure that events do not "just happen". Detailed instructions are issued throughout the organisation so that events shall happen in a certain way: a constant flow of control information is stipulated so that variations from the plan and their causes can be identified and dealt with. The training budget, although detailed separately, should be part of the organisational budgeting.

The steps involved are:

1. Diagnosis of the training needs of the organisation, in line with the objectives of organisation.

2. Drawing up of a detailed plan to meet the training needs identified.

3. Preparation of the training budgets, specifying

   - who is to be trained and how;

   - when and for how long;

   - how much will it cost.

   The budgets should also include training board grants claimed and levy payable.

4. Control of the function by comparing the actual activities and costs with those budgeted for.

5. Evaluation of results by comparing costs with benefits, and validation of the training in terms of whether or not it has accomplished what was planned. This is a continuous process leading to reassessment of the training needs, and the cycle starts again.

USING TRAINING MANUALS

Objectives	Tutors: 1. To demonstrate the usefulness of training manuals, both for the first course and especially for re-runs. 2. To encourage participants to compile their own training notes/manual. 3. To show that training notes/manuals are simple to write and can make life more relaxing for the trainer during the course. Participants: 1. To display the principles of giving constructive feedback as learnt during the course.	
Documents	Tutor's Manual 1 - Influence Skills for Women. Tutor's Manual 2 - Training Skills for Women . Subgroup lists of comments.	
Time	1 hour 30 minutes	
Method	Group discussions and work.	
1½ hrs	This session begins in subgroups. Tutors ask group members for questions and comments about the manual (1). Each subgroup should list comments on newsprint.	The aim is to get participants to see the use of manuals, especially for re-runs. Using them will make trainers seem and feel more efficient, and boost their self-confidence.
45 mins	Then distribute the manual for this workshop (2) and ask group members to read and comment on it. List these comments on another newsprint.	
20 mins	Lead a general discussion on the pros and cons of training manuals.	
20 mins	Subgroups disband and post their newsprints on the walls of the main plenary room. Everyone walks about and reads these. Allow informal, unstructured discussions.	Note, however, that manuals should be seen as an aid, NOT a bible.

WRITING REPORTS

Objectives	1. To plan and construct a report of this workshop, using the principles of report writing.
Document	Paper 27: "How to Write a Report".
Time	1 hour 30 minutes
Method	Presentation to whole group. Individual practical work.
20 mins	Tutor presents principles of report writing to whole group.
1 hr 10 mins	Participants work either by themselves or in their subgroups writing their own reports on this workshop for their department. Tutor helps where requested.

PAPER 27

HOW TO WRITE A REPORT

Any report should have four main parts:

1. Abstract
2. Introduction
3. Body of the report
4. Conclusion and recommendations

1. Abstract: This gives you an opportunity to provide a clear and precise statement of the content of the report. The abstract should be written in such a form that essential information of the entire report is not lost.

2. Introduction: The section on introduction should outline the objectives and aims of the report, the intended target group and sources of information.

3. The Main Body of the Report: This section should include an account of what the report is about, evidence in support of the account and some analysis of its importance.

4. Conclusion: This section should summarise key issues involved, as well as indicating suggestions and recommendations.

Report writing should be

1. objective,
2. structured,
3. written for an intended target group.

Types of reports

1. Objective report writing is based on "facts".

2. Subjective report writing is based on "opinions".

The credibility of a report depends on its sources of evidence, and how clearly they are expressed.

Facts can be obtained through a systematic investigation.

Principles of report writing

Reports should be

1. simple, e.g. for understanding;
2. explicit;
3. succinct and precise;
4. brief and relevant;
5. self-contained;

6. should contain an introduction or abstract;
7. should contain a conclusion or summary of points;
8. must convey the principal substance of what is intended.

Technique of report writing

1. Product a draft.
2. Check it with colleagues or solicit colleagues' reactions.
3. Reflect in the draft and check it against stated objectives.
4. Produce a modified version.
5. Keep an open mind to allow for legitimate and relevant changes.

EVALUATION TECHNIQUES

Objectives	Tutors:
	1. To acquaint participants with the principles of evaluating training.
	2. To introduce to them the differences between short-term and long-term evaluation.
	3. To get an evaluation of this course.
Document	Paper 28: "Evaluation of Training".
Time	3 hours
Method	Plenary presentation. Subgroup exercises on designing questionnaires.
30 mins	Plenary presentation on evaluation based on Paper 28, "Evaluation of Training". Answer questions.

PAPER 28

EVALUATION OF TRAINING

Why evaluate?

The purpose of evaluation is to determine the extent of programme success so that decisions such as the following can be made:

- to continue or discontinue the programme/project;
- to improve its practices and procedures;
- to add or drop specific programme/project strategies and techniques;
- to institute similar programmes/projects elsewhere;
- to allocate resources among competing programmes/projects;
- to accept or reject programme/project approach or theory.

Types of evaluation

Goal-based - how well goals and objectives are being met.

Goal-free - assessment of all possible outcomes including unanticipated and unintended outcomes.

Formative - evaluation for improvement, the monitoring of the activity during its progress and development; involves periodic feedback.

Summative - assessment of the activity after its completion.

Some techniques for obtaining data

(This is just a suggested list.)

Interviews
Questionnaires
Observation
Surveys
Checklists
Case studies
Analysis of records, reports and documents
Group problem solving
Simulation games
Use of pictures and photographs to stimulate responses and discussion
Analysis of physical evidence.

Characteristics of a good technique

- Must fit particular areas and situation;
- Must be acceptable to people involved;
- Must promote careful documentation of recording of data;
- Must provide representative information;
- Must recognise and eliminate bias as much as possible.

Characteristics of effective evaluation

- It is continuous.
- It is internal.
- It is external.
- It is participatory (involving representatives of all groups concerned).
- The results can be used for decision making.

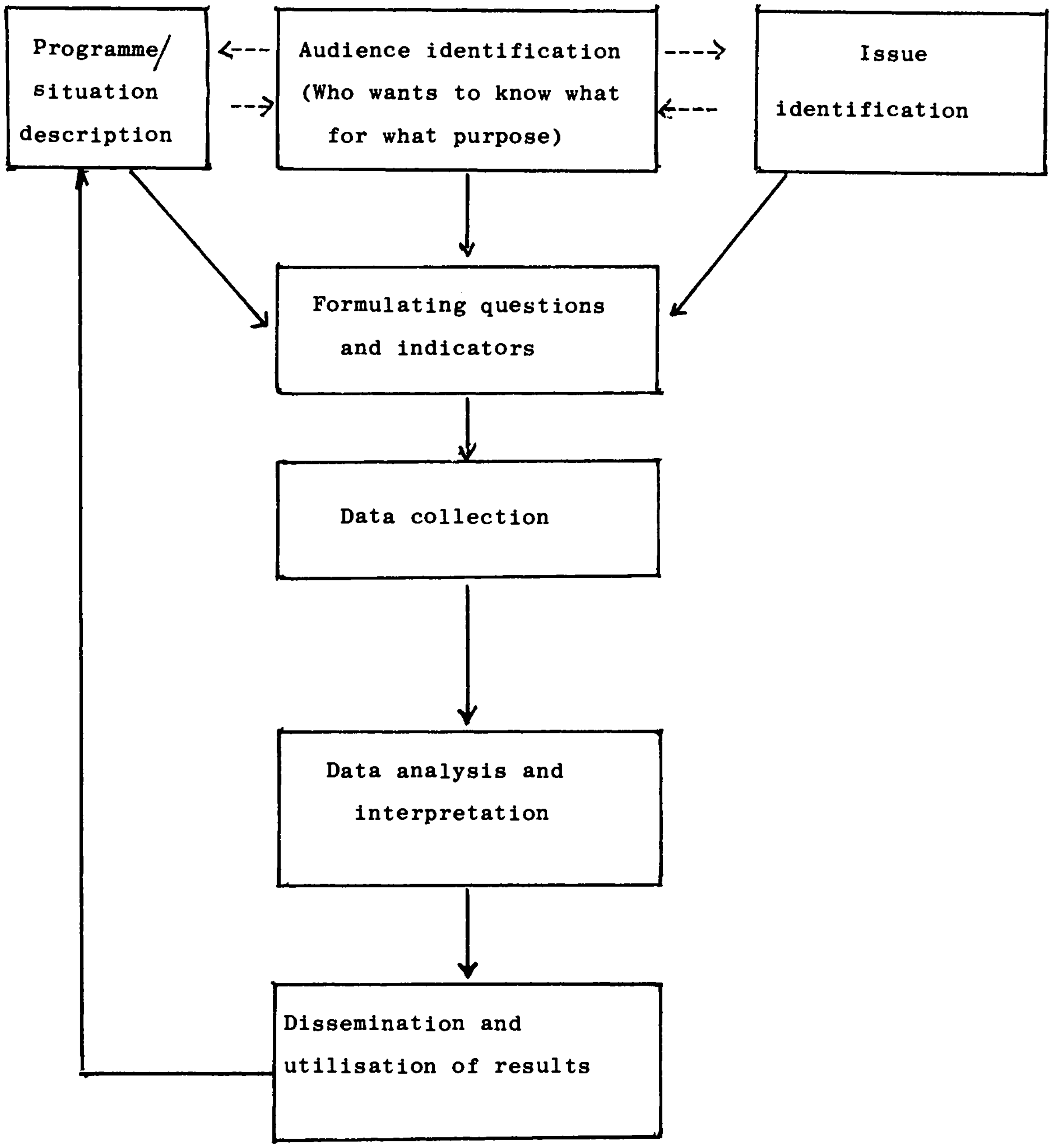
Some useful steps in evaluation

- Description and analysis of programme/situation
- Identification of audience, i.e. who wants to know what for what purpose?

    Policy-makers?
    Programme directors?
    Practitioners?
    Funding agencies?

- Identification of issues to be dealt with and decision on priorities
- Formulation of questions and decision on indicators
- Data collection
- Data analysis and interpretation
- Dissemination and utilisation of data.

EVALUATION MODEL



CRITERIA FOR EVALUATION OF DEVELOPMENT PROJECTS INVOLVING WOMEN

1. INITIATION AND LEADERSHIP: Are women involved in initiation? Number of women? Who? Status? Role? Indigenous? Are they responsible and responsive to project participation?

2. PARTICIPATION AND CONTROL: Do women participate in the direction of the project? How? Characterise the structure (if any: formal/informal) for participation and feedback. What is the participant's role? Will this experience change women's roles?

3. BENEFITS: What are the benefits of this project to women? Direct? Indirect? How are they measured? Do the participants perceive them as benefits in key areas in their lives? Is the project structured so that, having attained one objective, the participants can move on to others? Does the project contribute to increasing women's access to knowledge, skills, resources, the power structure?

4. SOCIAL CHANGE: Does this project increase women's options, raise their status? What are the political, economic and cultural implications of the project? Does the project create dislocations? Does it reinforce structures of exploitation? Have these effects been anticipated? What provisions are there to deal with them?

5. PROCESS: Does the project treat development as a process? How does it relate to a larger plan? Does it stimulate a broader base for continuing development? Is the project flexible enough to adjust its course to changes identified as desirable? Does the project treat women as an integral part of the family and of the community? Does it integrate them in the overall national development process?

Source: Criteria for Evaluation of Development Projects Involving Women, by Subcommittee on Women in Development of the Committee on Development Assistance, American Council of Voluntary Agencies for Foreign Service.

PLANNING APPLICATION OF LEARNING

Objectives	Tutors: 1. To give participants the chance to apply the principles of costing to their programmes at home. 2. To encourage participants to focus on reality at home as the workshop nears its close. 3. To teach participants to plan through learning-by-doing techniques. Participants: 1. To draw up one or more proposals for training activity which can be developed and implemented on return home. 2. To share proposals with other trainers and tutors.	
Documents	Copies of individual training proposals. Paper 29: "Withdrawal and Dependency".	
Time	2½ - 3 hours	
Method	Individual planning. Subgroup discussions on individual plans and feedback. Plenary discussion.	
2 hrs	Planning: applying principles learnt on course to problems at home. This starts with individual planning. Participants work on their own, writing down their plans and costing them. All the tutors wander about making sure that everyone knows what she is doing. Tutors should discuss difficulties with anyone who is in need.	Make sure no one opts out of this.
15 mins	Coffee break.	

1 hr	Subgroup discussion on plans: The workshop returns to the same subgroups used on Days 1, 2 and 3. Each group member reads out her plans and the tutor and other group members give constructive feedback, support and encouragement.	Try to keep feedback constructive rather than critical. Participants need their confidence boosted at this stage.
1 hr	General discussion in plenary led by the course director. Handout: Paper 29, "Withdrawal and Dependency".	
1 hr	Lunch break.	

PAPER 29

WITHDRAWAL AND DEPENDENCY

During training courses trainees often develop close ties with trainers and sometimes become dependent, especially when working in small groups. Ideally, the trainer should withdraw from the workshop, having enabled the trainee to plan a stable and effective training programme with the trainee having knowledge and skills for coping with training in her own situation. The key is to ensure that the trainee is no longer dependent on the trainer.

Things to do

1. Move trainees from group to group if possible to avoid excessive dependence.

2. Check that everything is going well - no undesired consequences, on target for achievement of objectives.

3. Ensure that trainee has plans for the future and is confident of her ability to achieve them. (N.B. This means no last-minute undermining of confidence.)

4. Ensure that trainee is committed to the requisite future activities - i.e. that she lays claim to the agreed solution.

5. Ensure the maintenance of some sort of a relationship - this could include a commitment to support if needed or future visits to check on progress.

6. Finish on a high, positive note.

Signs of problems

Excessive dependence. Anxiety.

PAPER 30

EVALUATION SHEET

Strong points

Content

Organisation

Tutors

Points for improvement

Content

Organisation

Tutors

3. INFLUENCE SKILLS

In the course of the first series of workshops developed in the Women and Development Programme, we recognised a need for confidence raising among women working in a variety of situations in women's desks/bureaux, in government offices, non-government organisations, in business, in training - anywhere, in short, where women need to be able to influence the people they work with or for.

Women attend many conferences, workshops, seminars, training courses on a variety of topics, covering a variety of skills and knowledge, but unless they have the confidence (and nerve) to take the things they have learned there and integrate them into their own working situation, such courses may be of little value. When new skills are introduced into an existing environment, people must adapt to the changes they bring. As human beings often fear and resist change as new and unsettling, the person who is trying to introduce a new methodology or technique often needs to be assertive.

Women and Development integrated several role-play sessions on influence skills into the training of trainers course, to try to make sure that trainees not only raised their own confidence but also developed knowledge and skills in confidence-raising techniques. Many of these sessions are also printed in the Tutor's Manual - Influence Skills For Women, also published by the Commonwealth Secretariat.

INFLUENCE 1 - GAINING ENTRY

Objectives	Tutors: 1. To establish the important principles of communication, using group experience. 2. To enable participants to share experiences in a supportive environment. 3. To encourage participants to demonstrate, learn and practise interpersonal skills. 4. To encourage participants to develop and use innovative or different techniques relevant to their work. 5. To foreshadow work on constructive feedback. Participants: 1. To demonstrate effective listening skills. 2. To practise the use of role-play as a training technique. 3. To demonstrate interview and feedback techniques for use in training.
Documents	Paper 31: "Influencing Other People". Paper 32: "Listening". Paper 33: "The First Meeting with Other People". Paper 34: "Giving and Receiving Feedback".
Time	4 hours
Method	Presentation to whole group. Listening exercises in subgroups (interviewing). Role-play in small groups.
15 mins	A short talk on influence skills based on Paper 31, "Influencing Other People", by the course director to the whole group. Identify for them why and when a tutor needs to be influential. Divide into the subgroups where each tutor goes through Paper 32, "Listening", explaining that listening and attentiveness are a prerequisite for influencing.

1 hr 30 mins	Listening exercise: The exercise takes place in 5 rounds. In Round 1, Person A is the interviewer, Person B is the interviewee. The rest of the subgroup are observers. In subsequent rounds these roles are rotated so that each member of the group will eventually have played each one. In each round the interviewee talks about her life history. The interviewer's task is primarily just to listen but she can request clarification or prompt the interviewee if she needs to. The observers keep a record of what is said and how attentive the interviewer is being. At the end of each interview: - the interviewer recalls what she has learned about the interviewee, - the interviewee and the observers comment on the quantity and quality of this recall, - the subgroup discusses what has been learnt. Each interview should be 5-7 minutes long. The feedback and discussion should take 10-15 minutes in each round.	
15 mins	Gaining entry discussion: The tutor of each subgroup goes through Paper 33, "The First Meeting with Other People" with the group. The tutor then explains that the group will now practise these skills in role-playing exercises.	
	The tutor, in the context of introducing the role-playing, goes through Paper 34, "Giving and Receiving Feedback".	Also explain that feedback is an important art in training in general.

2 hrs	Gaining entry role-playing exercises: Each participant identifies problems she has, or has had, in beginning or building relationships in her work.	She can do this mentally or write it down.
	When all group members have prepared their information, the role-plays can begin. There should be one role-play at a time, and while it is going on the tutor and the rest of the group observe.	
	Take the first group member and get her to describe her problem and give relevant background information. Find a suitable group member to role-play the other person (it may be several other people, in which case the whole group can join in). Let the role-play continue for 5 to 15 minutes. Stop the role-play when the cause of the problem has become apparent, or progress has been made. The tutor and the rest of the group give constructive feedback to the person concerned.	Tell her just to set the scene, not explain what happens. The personality of the other person should be outlined clearly enough for the other person acting to understand her role.
	Then go on to the next round. If possible, all group members should have a turn.	
	Feedback should be encouraged in the following stages after role-playing exercises or other activities (without being too rigid): 1. the interviewee; 2. the interviewer; 3. the other group members who have been observing; 4. the tutor herself; 5. the reaction of the interviewer to the feedback she has received; 6. general discussion of the issues raised during the role-play and feedback.	

PAPER 31

INFLUENCING OTHER PEOPLE - INTRODUCTION

The ability to influence others depends in part on your technical competence, training, experience and possibly also on your age and even your sex. The most important factor, however, is how skilfully you behave with other people. This is why, when we talk about influencing other people we talk of "influence skills". This programme will be giving you the opportunity to practise and develop these influence skills.

But first, what do we mean by "influence"? Here we are simply trying to get the other person to move from her or his present position to a new position, and to stay in the new position. The change in the other person may be in attitudes, behaviour or concrete action, but if you have brought about that change, then you have influenced them.

The need for influence skills

We need to develop influential ways of behaving in order to make an impact on other people. Those of us who are too weak, shy, quiet-spoken on the one hand, or too aggressive on the other hand may find we cannot get other people to budge, even if we are right!

What are influence skills?

We are going to attend to four aspects of influencing behaviour in this workshop:

1. The first meeting with the other person. How to make a good first impression so that she or he is pleased to continue to talk to you, listen to you or work with you.

2. How to use skilful questions with the other person so that you gain enough accurate information to be able to assess the situation and plan your strategy.

3. Assertiveness and confrontation. How to judge when these behaviours are necessary and to use them effectively.

4. Influencing groups. How to make a favourable impact on a meeting.

The need for flexibility of style

The main theme running through the practical exercises on influencing is the need to be flexible with your style of influence. Sometimes you need to be charming and persuasive, at other times you will get nowhere unless you are assertive. The skilled person is always listening to and watching the other person so that she can make judgements about the influence style she needs to use.

For demonstration use for Paper 31, "Influencing Other People".

INFLUENCE SKILLS

1. The first meeting
2. Asking questions
3. Asserting and confronting
4. Influencing groups

LEARN TO BE FLEXIBLE!

PAPER 32

LISTENING

1. The importance of listening

Communication is a process involving both the transmission and reception of information. The reception of spoken or auditory information involves hearing and listening: hearing is the physical apprehension of sound, whereas listening is the positive search for understanding and meaning. Thus listening is an active process while hearing is merely a passive one.

Face-to-face communication is important in all kinds of activity. Effective listening is a key part of the process of communication, as day-to-day relationships with colleagues and family depend on our ability to listen effectively.

2. Levels of listening

Listening occurs at different "levels", each requiring somewhat different skills. Four different levels may be identified:

a) recognising or identifying the words being used;

b) becoming aware of the meaning of the words being used;

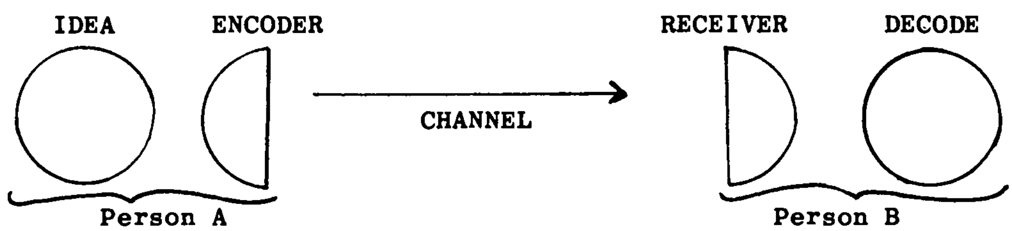
c) distinguishing fact from fancy, i.e. separating what is being said from what we think somebody like that is likely to say about a given topic;

d) understanding what is being said from the speaker's point of view, i.e. being empathetic.

N.B. : The amount of skill and concentration required increases as we move from level a) to level d).

3. The communication process

At this stage, it would be useful to consider what actually occurs in a basic communication before considering what helps and what hinders effective listening. The model below depicts a simple verbal exchange:



A has an idea, puts it into words (encodes), the oral message travels from A to B, B listens to the words and interprets (decodes) the idea. Apparently, it is a very simple process, yet many things can happen which prevent A's original message being accurately "decoded" by B.

4. Barriers to effective listening

There are three main types of barriers to effective listening:

a) Physical barriers

These include environmental factors which limit or prohibit listening, e.g. distance, noise, disturbance and distractions, as well as such things as lack of time. One major constraint stems from our capacity to think at about four times the speed that we can talk. Although this enables us to "process" information as we listen, it also means that we are prey to other distractions, internal (i.e. thinking about something else) or external.

b) Psychological barriers

There are numerous possible psychological barriers to effective listening, e.g.

- emotions
- differences in social values
- prejudices and stereotypes
- status differences
- alertness
- memory
- etc.

c) Semantic barriers

Semantic barriers are barriers arising from the meaning of words. They may include the following:

- some words have a number of meanings;
- some words may be misused;
- ideas may be badly expressed, e.g. by using long words (or jargon), long sentences and long paragraphs.

5. Key points for effective listening

Given the enormous number of constraints, what can one do to try to listen more effectively? Research tends to suggest that the following may be useful:

a) Try to judge the content of a message rather than the person sending it.

b) Try to suspend judgement initially: listen in a non-evaluative way, and only evaluate when you have fully understood.

c) Listen analytically: look for central ideas, themes, links, necessary details, etc.

d) Eliminate distractions (e.g. noises, people, views, etc.) and concentrate on your speaker.

e) Seek clarification or repetition when necessary: help the communicator to help you to understand.

f) Give yourself enough time to listen: be prepared to respond, but not too hastily.

g) Be alert for any emotional undercurrents that may lie beneath what is being said. Non-verbal cues may be particularly important in this context.

h) Adopt a manner that will help you to attend to what is being said, i.e. <u>look</u> at the person, maintain good eye contact, sit alertly in an open posture, etc.

6. <u>The pay-off</u>

The first paragraph of this paper stressed the importance of listening. The results of <u>effective</u> listening are likely to include:

- A better grasp of what the speaker is saying; you are more likely to secure as much information as she possesses.

- Better working relationships, because you understand more accurately and because people appreciate attention and interest.

- More effective solution of problems or disagreements.

- More likelihood that people will see their own problems or difficulties clearly by having the opportunity to talk and think them through.

PAPER 33

THE FIRST MEETING WITH OTHER PEOPLE (GAINING ENTRY)

In order to influence someone you must make a favourable impact at the first meeting so that they are willing to continue to listen to and to work with you. This is called "gaining entry" and is the first stage in successful influencing.

Building a good relationship

Gaining entry means dealing with the other person's initial concerns and making a start on building a good working relationship. This depends on:

1. Establishing rapport. Listen actively. This means observe closely as well as listen and reflect back what you hear them say. Also empathise and encourage so that they feel you are genuinely interested and concerned. Try to smile a lot!

2. Dealing with anxiety. The other person may have anxiety about your purposes, why you are approaching her/him, whether you will be able to help or be a nuisance, what effects your presence will have and so on. You may also be feeling anxious about being credible and able to influence.

   Obviously little can be done about anxiety over the eventual outcome at this early stage. What you can do is to provide some structure for the meeting:

   - set a clear agenda;

   - explain clearly who you are, what your organisation does and what are your objectives (this might include what you have to offer);

   - identify the other person's objectives and concerns;

   - be explicit about the time required for the meeting.

   Anxiety is sometimes manifested as hostility. In this case you will have to deal with the hostility before it will become possible to make any progress with your other objectives.

3. Building trust and confidence. The other person needs to trust you before she/he will do what you ask, particularly if this involves taking risks. Ultimately your own motives, willingness to help and actual behaviour will determine the level of trust. You can however begin to build trust at an early stage by doing the following things:

   - show genuine interest;

   - show empathy with her/his view of the situation;

   - share control of the meeting by agreeing an agenda;

- display integrity with information;

- encourage openness by being open yourself.

4. Establishing your credibility. You may need to display your knowledge and experience in relevant areas. The way you behave in the meeting can help to establish your credibility. You need to manage the meeting well and cope with the other person's anxieties. Being visibly anxious yourself and making an elaborate presentation of your qualifications is likely to arouse anxiety and distrust.

PAPER 34

GIVING AND RECEIVING FEEDBACK

Introduction

A. Giving feedback

Feedback is communication to a person (or group) which gives her information about

- her performance,
- how she affects other people.

As in a guided missile system, feedback helps keep a student "on target" so that she may be able to achieve her goals. Research into learning shows that students have more success in achieving their goals if they receive prompt feedback on their performance.

B. Receiving feedback

Some of the most important information we can receive from other people is feedback on our behaviour. Such feedback can help us to learn if we use the reactions of others as a mirror for observing the consequences of our behaviour. Such personal feedback helps to make us more aware of

- what we do,
- how we do it.

This can help the trainer modify her behaviour and become more effective in dealing with students.

This paper presents 13 guidelines for giving and/or receiving feedback which should be of help to the trainer.

1. Focus feedback on behaviour rather than on the person.

   It is important that we refer to what a person does rather than comment on what we imagine she is. This focus on behaviour further implies that we use adverbs (which relate to actions) rather than adjectives (which relate to qualities) when referring to a person. Thus we might say a person "talked considerably in this meeting", rather than that this person "is a loudmouth". When we talk in terms of "personality traits" it implies inherited constant qualities difficult, if not impossible, to change. Focussing on behaviour implies that it is something related to a specific situation that might be changed. It is less threatening to a person to hear comments about her behaviour than her "traits".

2. Focus feedback on observations rather than on inferences.

Observations refer to what we can see or hear in the behaviour of another person, while inferences refer to interpretations and conclusions which we make from what we see or hear. Remember that these inferences or conclusions may be wrong. Where they are shared, and it may be valuable to have this data, it is important that they are recognised as inferences, not facts.

3. Focus feedback on description rather than on judgement.

The effort to describe represents a process for reporting what happened, while judgement refers to an evaluation in terms of good or bad, right or wrong, nice or not nice. The judgements arise out of a personal frame of reference or values, whereas description represents neutral (as far as possible) reporting. Avoiding evaluative language reduces the need for the recipient to react defensively.

It is difficult not to judge or evaluate people; we have tended to grow up in a world where most people do it, and it tends to give us a sense of superiority or rightness to evaluate what others do. One thing which may help to counteract this is to separate what the other person is doing, and what you feel as a consequence.

Thus, "You're a bore" probably means "You talk a lot and so I feel bored". It is much more helpful to use the second feedback because this may help the person who receives the feedback to learn that she needs to talk less. But the giver may learn that she easily loses interest when other people are talking. This may be helpful when receiving feedback. When being judged critically we tend either to accept it and blame ourselves, or reject it and say others don't understand. But if you can separate the judgement into "what am I doing?" and "what is she feeling?" the feedback becomes easier to understand and may lead to both parties learning from the event.

4. Give feedback promptly.

Feedback should be given at the latest an hour after the student has "performed".

5. Focus feedback on the sharing of ideas and information rather than on giving advice.

By sharing ideas and information we leave the person free to decide for herself, in the light of her own goals in a particular situation at a particular time, how to use the ideas and the information. When we give advice we tell her what to do with the information, and in that sense we take away her freedom to determine for herself what is for her the most appropriate course of action.

6. Focus feedback on exploration of alternatives rather than on answers or solutions.

The more we can focus on a variety of procedures and means for the attainment of a particular goal, the less likely we are to accept prematurely a particular answer or solution - which may or may not fit our particular problem. Many of us go around with a collation of answers and solutions for which there are no problems.

7. Focus feedback on the value it may have to the receiver, not on the value of "release" that it provides the person giving the feedback.

The feedback provided should serve the needs of the receiver rather than the needs of the giver. Help and feedback need to be given and heard as an offer, not an imposition.

8. Focus on behaviour which the receiver can do something about.

Frustration is only increased when a person is reminded of some shortcoming over which she has no control.

9. Focus feedback on the amount of information that the person receiving it can use, rather than on the amount that you have which you might like to give.

To overload a person with feedback is to reduce the possibility that she may use what she receives effectively. When we give more than can be used, we may be satisfying some need for ourselves rather than helping the other person.

10. Focus feedback on time and place so that personal data can be shared at appropriate times.

Because the reception and use of personal feedback involves many possible emotional reactions, it is important to be sensitive to when it is appropriate to provide feedback. Excellent feedback presented at an inappropriate time may do more harm than good.

11. Focus feedback on what is said rather than why it is said.

The aspects of feedback which relate to the "what", "how", "when", and "where" of what is said are observable characteristics. The "why" of what is said takes us from the observable to the inferred, and brings up questions of motive or intent.

To make assumptions about the motives of the person giving feedback may prevent us from hearing or cause us to distort what is said. In short, if I question "why" a person gives me feedback, I may not hear "what" she says.

12. Check that the communication has been clear.

One way of doing this is to ask the receiver to try and rephrase the feedback she has received in her own words to see if it corresponds with what the giver had in mind.

13. Check the accuracy of the feedback.

When the feedback is given in a training group or work group, both giver and receiver have the opportunity to check with others in the group the accuracy of the feedback. Is this one person's impressions or an impression shared by others?

Feedback, then, is a way of giving help; it is a useful mechanism for the person who wants to learn how well her behaviour matches her intentions; and it is a way of helping an individual to establish her identity. Feedback to a group can serve similar functions. The giving (and receiving) of feedback requires courage, skill, understanding and respect for self and others.

INFLUENCE 2 - FLEXIBILITY OF INFLUENCE STYLE

Objectives

Tutors:

1. To outline the types of problems which may need flexible approaches in training courses.

2. To establish by practical exercises the skills within the group in handling communication breakdowns in the course of training.

3. To enable participants to practise new/different methods of influencing and problem solving.

Participants:

1. To learn how to solve a communication problem through using role-play and to demonstrate an ability to give constructive feedback.

2. To show practical skill in using interviewing techniques.

Documents

Paper 35: "Influence Styles".
Paper 36: "Influencing".
Paper 37: "Supporting Behaviour".
Paper 38: "Dealing with Anger and Hostility".
Paper 39: "Summarising and Reflecting".
Paper 40: "Dealing with Conflict".

Time

3 hours

Method

Small group work, with initial presentation by tutor.
Role-play.

The whole of this session is to be done in subgroups, but the subgroups should now be changed so that participants are working with new people and tutors. However, the learning reviews should remain in the original groups. Unless the tutors judge otherwise the subgroups should now be changed for each new exercise until the last two days of the course, when the original groups should be together again.

By this time participants should be feeling confident enough to join different subgroups.

The tutor distributes Paper 35, "Influence Styles", and asks each group member to identify those which she normally uses. The tutor points out the comments on the paper which relate to the styles chosen by the participant. She then explains the need for flexibility of style to cater for different situations and people. She follows this up by going through Models 1 and 2 outlined in Paper 36, and suggests that where participants are having influence problems it will be because of

- lack of skill,
- wrong style chosen,
- or both.

Role-playing exercises:
Each group member is to identify problems she has, or anticipates in influencing others.

When all the group members have prepared their information, mentally or on paper, the role-plays can begin. Take one role-play at a time, and while this is going on the tutor and the rest of the group observe.

Take the first group member and ask her to describe her problem, giving relevant background information. Find a suitable group member to role-play the other person. Ask the problem owner (with the other role-player out of the room), to state whether she is going to use Model 1 or 2 and generally discuss her strategy.

Let the role-play continue for 5-15 minutes. Stop the role-play when the cause of the problem has become apparent, or progress has been made.

The tutor and the rest of the group give feedback to the problem owner.

Then go on to the next round. If possible, all group members should have a turn.

When these issues arise in the role-plays, distribute and go through the papers on
"Supporting Behaviour",
"Dealing with Anger and Hostility",
"Summarising and Reflecting",
"Dealing with Conflict".

Better to let them have these in dribs and drabs throughout the session as the need arises because it's a lot to absorb.

PAPER 35

INFLUENCE STYLES

Type	Characteristics	Comments
Coercive	Threat of costs, punishment to be inflicted.	Liable to produce resentment, lack of commitment.
Educate	Provision of information.	Learning if perceived as relevant. Distrusted if there is conflict of interests.
Sell (Unethical)	Distortion of information.	Possibly effective in short term but generates problems for the future: resentment, low trust, end of commitment.
Sell (Ethical)	Emphasising benefits to other party of agreement.	Trust is required - otherwise perceived as manipulative or self-serving.
Rational/Logical	Argument based on logic and reason.	Fails if there is conflict of interests. Requires low emotional temperature.
Emotive	Appeal to feelings, values. Especially, attempts to make other party feel guilty.	Many people unable/unwilling to work at feelings level.
Assertive	Simple repetition of what is wanted. Perhaps accompanied by some acceptance of other person's point of view.	Can be effective where compliance rather than commitment is all that is required. If influencer is willing to compromise, shades into negotiation or joint problem solving.
Expert	Based on claim to superior knowledge/expertise - medical model.	Credibility required. Low ownership of solution. Danger of dependence. Scapegoating of influencer if solution does not work.
Model	Provision of example.	Creates dependence on model being present, difficult to transfer to new situation.

Type	Characteristics	Comments
Charismatic	Use of personality and ego strength.	Liable to produce dependence. Committed while personal needs are met. Can feel let down once influencer not there.
Negotiation	Outcome decided by bargaining.	Assumes rough equality of power - mutual influence. Requires compromise.
Joint problem solving	Mutual agreement of best decision on basis of agreed criteria.	Requires high trust. Can lead to best available decision and high commitment. Time-consuming.
Non-directive	Helps client to develop own analysis of and solution to problem.	High ownership of solution. Influencer has least control over nature.

PAPER 36

INFLUENCING

Model 1

Stage	Skills
Make proposal	Agenda setting Assertiveness Presentation
Get reactions	Listening Questioning Reflecting
Summarise and check	Summarising
Deal with objections	Influencing: choice of appropriate style/level according to whether commitment or compliance is required.
Outcome	Summarising

INFLUENCING

Model 2

Stage	Skills
State your view of the problem	Agenda setting Presentation - do tentatively Feedback
Clarify others' perceptions	Listening Reflecting Questioning Summarising
Get agreement to existence of problem	Handling information - use of evidence, feedback
Seek solutions	

Seek solutions:

- Propose yours (Model 1)
- Invite theirs
- Seek jointly

PAPER 37

SUPPORTING BEHAVIOUR

You may need to use supportive behaviour at the first meeting in order to build rapport, or at any stage in your contact with the other person when she/he seems hesitant, nervous or tentative.

Support is demonstrating acceptance of the other person no matter what she/he thinks, says or feels. It is independent of whether or not you feel the same way.

What to support:

- the other person's hesitancies, fears, doubts,uncertainties and anxiety;

- the right of the other person to feel differently from the way you might in the same situation;

- the reality of the other person's perceptions, even when you see things differently.

How to support

1. Accept what the other person tells you as real (for her/him).

2. Don't give unsolicited advice.

3. Don't tell a person she/he shouldn't feel, think or believe that way. Such talk is never experienced as helpful.

4. Listen.

5. Reflect back: restate what the other person has told you using similar words.

6. Suppress your pet solution. Ask the other person what actions she/he has thought of.

7. Ask the other person what kind of help is needed. Supply the help if you can. If you can not, explain why clearly.

8. Don't generalise (i.e. "everybody feels that way") because that is not helpful.

Examples of supportive phrases

It is upsetting to have that happen.
I can see why you feel that way.
How did you handle that?
What do you want to do about it?
You feel bad because that happened.
What kind of help do you need?

PAPER 38

DEALING WITH ANGER AND HOSTILITY

Often the other person's insecurity, anxiety, lack of trust, etc., will express itself as anger or hostility directed at you. If you are trying to influence that person you need to deal with the anger before you can proceed to meet your objectives.

Signs of anger

Watch the other person carefully as their body language will often betray their anger even if they are not shouting or raving at you. Anger is accompanied by increased blood pressure and muscle tightness. People speak faster, less coherently, louder, at a higher pitch and use aggressive language. Posture tends to be leaning forward (if sitting) accompanied by vigorous gestures.

Coping with anger

It is helpful to distinguish two kinds of coping behaviour, internal and external.

Internally The secret seems to be to distance yourself psychologically from the anger. Try to work out what is happening instead of becoming emotionally involved. In this way you can avoid being paralysed by the anger and can instead concentrate on reacting appropriately.

Externally

1. Let the other person express her feelings - attempting to disallow anger will only increase its intensity. Listen actively to what the other person is saying.

2. Clarify and diagnose why the other person is angry - by reflecting, asking questions and summarising. You need to do this neutrally, in a way that is neither condescending nor judgemental.

3. Don't argue back. You can express your own feelings but don't surrender to them.

4. Do what you can to reduce the threat you pose to the other person. Agree to behave differently, give explanations, apologise, etc.

Prevention

Better than coping is to avoid making the other person angry in the first place. Being open about your purposes, agreeing an agenda, not trying to manipulate, avoiding judgement, criticism and jargon may all help.

PAPER 39

SUMMARISING AND REFLECTING

Interviews often seem to take the form of asking questions. However, two other useful skills for the interviewer to master are summarising and reflecting. They are treated together here because they are closely related - indeed, it is often difficult to draw the line between them.

Summarising

A summary is a statement which brings together or synthesises information previously given by the interviewee. Typical ways of introducing a summary would be:

"So you're saying ...."

"If I understand you correctly you mean ...."

"So the main problem was ...."

The major reasons for summarising are:

1. to confirm to yourself that you have heard and understood what she has been saying;

2. to confirm to the interviewee that you have heard and understood what she has been saying;

3. to cut short someone who is being too long-winded, but without being too abrupt;

4. to mark the end of a phase of the interview - a summary can be a natural prelude to broaching a new subject;

5. at the end of an interview again for closure but also for final confirmation and reinforcement of what has been agreed.

Reflecting

Reflecting - sometimes called "mirroring" - consists in playing back to the interviewee a word or phrase that they have just used, e.g.

Interviewee: "Of course, my boss always distrusted me...."

Interviewer: "Distrusted you?"

The main purpose of reflecting is to request clarification or expansion. It is a neat and simple way of doing so, particularly appropriate when you want to keep the interviewee talking as much as possible.

But beware:

- don't reflect when it is clear that a topic has been exhausted - that is merely irritating;
- don't overdo it: you can come to sound like a tame parrot (or a joke psychiatrist).

PAPER 40

DEALING WITH CONFLICT

Many people, particularly women, when trying to influence others, use behaviour styles which are based on attracting and charming the other person. Although these styles are often appropriate there will be occasions when conflicts arise and must be dealt with. The successful influencer needs to be able to use whatever style she thinks will work for that person or that situation.

Assertive influence styles

Assertive influence styles are only effective when you know clearly where you want to go and you are sure you are right. There are several different methods which can be used.

1. Coerce

   Apply pressure by showing the other person the cost to her/him of not going along with you. This can cause resentment and lack of commitment.

2. Educate

   Provide information which the other person does not have. This can be effective if your information is seen as relevant. If there is a conflict of interests you may be distrusted.

3. Persuade

   Sell your ideas to the other person with logical arguments. This can be effective if she/he trusts you, otherwise you will be seen as manipulative or self-seeking.

4. Emotional appeal

   Appeal to the other person's feelings and values.

5. Use expertise

   This is persuasion based on your claim to superior knowledge and expertise. First you must build credibility for this to work. There is a danger that the other person may become dependent on you and scapegoat you if things go wrong.

6. Vision building

   Build a vision for the other person of how things could be if she/he went along with you.

There are inherent dangers in assertiveness, but there are times when nothing else will work, and there are people with whom no other style will work. You must be sure you are right before becoming assertive, because this influence style means that you are pressurising someone to move in a direction chosen by you. If it turns out afterwards to be the wrong direction, then the blame is placed squarely in your court.

Confrontation

Another related method of getting the other person to move when all else fails is confrontation. This when skilfully used is a very powerful influence style, but should be used sparingly. People who are seen as very confrontational tend to be feared and avoided.

What is confrontation?

Confrontation is making the difference explicit between

- what you value and what the other person values;
- what you think and what the other person thinks;
- what you feel and what the other person feels.

When you do this you risk hurting the other person's feelings.

Confrontation also makes differences explicit between

- what you want to do and what the other person wants to do;
- what you actually do and what the other person actually does.

When you do this somebody has to change their behaviour; the risk is that it may be you.

Confrontation also makes differences explicit between

- what the other person says and what they do.

When you do this you risk making the other person angry (defensive).

How to confront

1. Acknowledge the other person's position as legitimate (for her/him).
2. Differentiate the other person's position from yours.
3. Check to see whether you have heard the other person clearly and that she/he has heard you.
4. Accept angry, hostile feelings in yourself and in the other person as real. Be responsible for your own feelings. Leave the other person free to feel differently.

5. Don't try to solve the problem until differences have been fully explained.

6. Ask the other person to describe her/his preferred solution. Be prepared to state (and differentiate) yours.

Examples of confronting phrases

"We see that differently."

"You believe X whereas I believe Y."

"I disagree. Your position is X and mine is Y."

"Do you understand my position? It would help me if you could say it back to me."

For demonstration use for Paper 40.

ASSERTION

1. COERCE
2. EDUCATE
3. PERSUADE
4. EMOTIONAL APPEAL
5. USE EXPERTISE
6. VISION BUILD

BUT FIRST - MAKE SURE
YOU ARE RIGHT!

CONFRONTATION

1. Acknowledge their position
2. Make differences explicit
3. Make sure you've heard each other
4. Accept angry and hostile feelings
5. Fully explain differences before problem solving
6. Ask them for their preferred solution

For demonstration use for Paper 40.

INFLUENCE 3 - BEING INFLUENTIAL IN A GROUP

Objectives	Tutors: 1. To display a knowledge of the processes involved in working in groups. 2. To show an ability to draw people into the discussion and encourage participation by all. 3. To analyse and put into practice the demands of influence in group dynamics.
Time	3 hours
Method	Role-play Feedback
15 mins	Split the workshop into subgroups with a tutor in each. The tutor explains that the group has one hour to complete the following task: "Identify past approaches to training and identify those practices which were successful." The group will have successfully completed its task when it produces a list on newsprint of agreed success factors after its discussion.
45 mins	Before the meeting begins the tutor asks each group member to identify what she has personally learnt from the morning's exercise: a) about groups, b) about her own strengths and weaknesses in groups. Each group member then identifies a short list of types of behaviours she is going to practise in the meeting so as to improve on her effectiveness, and writes the list on a sheet of paper with her name on top.
1 hr	While the meeting is in progress the tutor makes observation notes.

30 mins	Immediately after the meeting the tutor passes round the named sheets for each group member. Each group member must have a sheet with her name at the top. Everyone then writes comments on each sheet about that person's role and behaviour in the meeting. When this is finished everyone walks about and reads the comments.	Tutor needs to be supportive; this exercise is very stimulating but can be disturbing for some people.
30 mins	The tutor then gives feedback on the group's performance and on the contributions of each group member, using the comments on the newsprint as well as her observation notes.	

INFLUENCE RE-RUNS

Objectives

Tutors:

1. To give participants a chance to become more skilled in influence.

2. To build up the self-confidence of participants in their influence skills so that they are more likely to try them at home.

Participants:

1. To show increased skills in influencing and to concentrate practice on any problem areas.

2. To demonstrate expertise in the use of role-play techniques.

Document

Paper 41: "Influence Skills".

Time

2 hours

Method

Small group role-plays.

2 hrs

These are to be conducted in subgroups. The tutor explains that this is just a further opportunity to practise influence skills. Each participant is to have a turn, either role-playing real back-home situations or, if they want practice, influencing other group members on real issues, for example:

- try to sell the other person your car, house, cooker, stereo, tape recorder, clothes, etc.

- try to get the other person to visit you or invite you to her country.

While each role-play or influence practice is going on the rest of the group observe, then give feedback when it is over. Allow a re-run after any unsuccessful experiences.

Try to get people to end up doing well so that they get some good feedback and go home with more confidence.

PAPER 41

INFLUENCE SKILLS*

Two people may come together for a variety of purposes: instructing, counselling, informal discussion, influencing, consulting or persuading. Regardless of the purpose, the interaction will contain certain characteristics specific to two-person situations. Though similar issues and processes are present in both group and two-person situations, they are often more evident and difficult to avoid when only two people are involved. Two-person situations tend to stabilise quickly into a rigid pattern which is difficult to alter. In contrast, if two people are talking in a group situation it is likely that others will join in and influence the discussion, by supporting one side, providing alternative views, or by proposing a compromise suggestion acceptable to both. In a group it is possible to be silent for periods of time and solicit ideas from others, when positions are entrenched or when the discussion isn't satisfactory. When there are differences of opinion, as a last resort one can always vote in a group situation. On the other hand, staying focussed on the subject and keeping alternatives at a manageable number are more likely in two-person situations.

The table on the opposite page summarises the relevant issues and influences in a two-person situation.

The remainder of this chapter will discuss approaches to working with others. The first section lists the kinds of issues which are likely to be viewed as important by two people working together. If they are openly discussed, then differences between the two in terms of objectives and frames of reference are likely to be minimised, and the likelihood of a satisfactory interaction increased. The second section describes different styles and approaches of dealing with people. The third section describes a system for exploring an individual's basic patterns of approaching others and how this can either facilitate or hinder rational discussion, work or creativity.

* Based on work by Mel Berger.

FACTORS AFFECTING A TWO-PERSON INTERACTION

The relationship between Person A and Person B

Past experience together,
current feelings about one another, e.g.
liking, trusting
status and functional relationship

Person A		Person B
View of perception of situation: - purpose, aims - expectations - hopes	The inter-action:	View of perception of situation: - purpose, aims - expectations - hopes
Interpersonal skills and repertoire of styles of relating to others	⟷	Interpersonal skills and repertoire of styles of relating to others
Basic approach to people: - dependency, dominance - closeness, distance - competitive, co-operative		Basic approach to people: - dependency, dominance - closeness, distance - competitive,co-operative

The context: location

time

physical setting

organisation and group

standards, procedures and expectations.

1. Process issues and expectation

Working with people is facilitated when the following process issues are raised and resolved.

AT THE BEGINNING OF THE INTERACTION

a) What is the purpose or objective of the interaction - for example, to make a decision, to discuss something, to appraise or criticise someone's work, or to receive an instruction?

b) How much time is available?

c) What expectations do we have of one another - for example, to listen critically, to give an opinion or to take a decision?

DURING THE INTERACTION

d) How do people feel about the progress being made?

e) How do people feel about one another - for example, about dominance by one person, and interruptions?

f) Have issues arisen that differ from the original purpose or agenda but need to be dealt with during this or future meetings? Have issues arisen which cannot be dealt with without the presence of people not currently at the meeting?

TOWARDS THE END OF THE INTERACTION

g) Is everyone clear about the conclusions reached and about actions which they are committed to carrying out?

h) Are further meetings or progress reviews necessary?

PRACTICAL WORK

In a meeting or discussion that you are observing, try to identify whether these eight issues are dealt with or ignored. Can you observe any adverse consequences of an issue being ignored?

In a meeting or discussion in which you are taking part, try self-consciously to deal with each of the eight issues. Can you observe any consequences in dealing with these issues, either in terms of output or group morale?

2. Styles of working with other people

	Behaviour Style	Examples
Other-focussed	Refuses to become involved	"Why don't you have a go on your own first?" "I'm too busy to help you." "That is your problem to sort out."
	Listens	Remains silent, occasionally encouraging the other by eye contact,nods,or saying "Uh-huh". "Could you say more?"
	Reflects or clarifies	"As I understand it, you are saying..." "You seem to feel...(e.g. encouraged, unfairly treated, confused)."
	Probes (questions)	"Could you tell me about it?" "Why do you think so?" "Have you tried to do anything to improve the situation?"
	Interprets	"It seems to me that...(e.g. you feel insecure about the future, there is a status problem, there is a lack of trust)."
	Adds new data	"I will tell you some of the background to...(e.g. the decision, the problem)." "There are several alternative sources of information..." "There is a memo which discusses the point."
	Identifies options	"It seems to me that you could do...or possibly...." "You could talk to Mr X before going ahead."
	Proposes criteria for evaluating alternatives	"It seems to me that your choice should be guided by...(e.g. What is acceptable to Mr X,the likely effect on production, the likely reaction of your staff)."
Self-focussed	Recommends, proposes solution	"I think you should do..."

As a general guideline, it is best to be other-focussed when the other person has considerable technical knowledge and skills, is motivated to work on the task her/himself, is interested in developing her/his expertise, and is responsible for the consequences of the action. It is generally best to be self-focussed when the other person has less technical knowledge and fewer skills than you, is not motivated to work on the problem, and is not responsible for the consequences of the action.

PRACTICAL WORK

Assess your own behavioural style and how you think others see your style. Then ask people whose judgement you trust how they see your style. If there are discrepancies, talk about them and try to understand how they arose. Remember, it is not uncommon for people to see themselves differently from the way others see them.

Think about behavioural styles you have seen in others, both in a work situation and on the course. Then judge the effectiveness of the style in a given situation. You are likely to find that the same style can be effective in one situation and not effective in another.

Observe a two-person situation and try to categorise the behavioural styles of different group members. Also try to assess the effect that different styles have on other people. Alternatively, you may wish to ask someone to observe your behavioural style.

3. Basic patterns of approaching others

It is common for people to relate to others in ways which do not pertain to the work in hand but to their own habitual patterns of dealing with others. For example, some people are dependent on others regardless of relative task skills, while others are always dominant in their views, and still others are expert at giving excuses for not doing things or for not doing things well. Eric Berne, in his best-seller Games People Play[a], describes a method of analysing the ways in which people interact and the common patterns or "games" which hinder rational discussion and problem solving.

He proposes that people can relate to others in the following basic ways:

- as a parent: here the approach to others is based on rules or "shoulds" or codes of conduct which are not open to question.

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[a]Berne, E., Games People Play, Penguin, 1967. See also Harris's I'm OK you're OK, 1969.

- as an adult: here the approach to others is based on the reality of the situation; it is rational, problem solving, fact finding and unemotional.

- as a dependent child: here the approach to others is to comply dependently or to rebel on principle, not based on the issues involved.

- as a spontaneous child: here the approach to others is creative, intuitive, emotional and spontaneous.

All of us have these different parts within us: parent, adult, and dependent child and spontaneous child.

Berne found that people seek out others who have complementary styles of interacting. As a result, fairly stable patterns of relating are established. These are called "games" where they prevent people from dealing with one another in creative or rational ways. They are not games in the recreational or fun sense; rather they are serious and sometimes unconscious. The payoff of a game can be such things as stability in a relationship, avoidance of responsibility for one's action, and avoidance of developing a close relationship.

An example of a game which often develops is "I'm only trying to help you". This game is often played by a dominant boss, mother or over-eager teacher. It consists of one person telling another what to do and insisting that the advice should be followed. When challenged, this person will point out the ingratitude of the other to reject help given so generously - after all, "I'm only trying to help you." The payoff for the person playing this game is control of the situation. The game can be reinforced where the other person acts independently and makes a mistake. She can then be told, "I told you so."

Another example is "See what you made me do". This game is played where an individual is afraid to make a mistake. So she asks someone to tell her what to do, then if she is subsequently unsuccessful she can blame the other: "See what you made me do." Here the payoff is avoidance of responsibility. A person playing this game is likely to team up with someone playing "I'm only trying to help you".

Other games include "wooden leg" - "I can't be expected to perform very well with my handicap" - e.g. wrong education, too young or too old, wrong sex, wrong past experiences: "Now I've got you, you *?!*!" - "I've been watching you, waiting for you to make a mistake and now I'll make you suffer."

GIVING UP GAMES

It is generally difficult but possible to give up playing a particular game. This is because people tend to resist giving up the familiar and fear trying something new. The first step is the feeling of dissatisfaction with some aspect of a relationship. The second step is to identify the game being played and what one is doing which perpetuates the game. The third step is to stop playing the game. Several ways of doing this have been enumerated by Jongeward and James (1973)[a]. For example, a person may

- give an unexpected response, or not get pulled into the response demanded by the game;

- stop playing rescuer (that is, helping those who can help themselves) - instead, encourage them to try it for themselves;

- stop playing victim (that is, acting helpless or dependent) - instead, have a go yourself or try asserting yourself in a situation;

- as a last resort you can withdraw from the relationship. In this case, it will be helpful if you tell the person why you are withdrawing and the conditions under which you would be prepared to re-establish contact.

4. Styles of influence

Regardless of whether one is a formal leader, to be with people is to exert influence and to be influenced. The manner in which people exert influence varies enormously: some do it by bullying, others by logic, and still others by "asking for help". Some typical styles of influence are described opposite, based on typologies developed by Rad Cadwell. There is no one "right" style. Rather, in different situations, one style is likely to be more effective than certain other styles.

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[a] Jongeward and James, Winning with People: Group Experiments in Transactional Analysis, Addison-Wesley, 1973.

Style of influence	Basis of influence	Likely impact and consequences of the style on others
Coercive	Power, authority	One feels restricted and controlled: may become dependent or may fight back.
Expert	Superior knowledge or expertise	One feels little ownership of solution. Where solution works it may lead to dependency, where it doesn't work the influencer may be scapegoated.
Sell	Presentation skills, distortion of information	One feels tricked or pushed. Can lead to low trust and suspicion.
Charisma	Identification[a], personal attractiveness	One feels dependent and committed so long as personal needs are met.
Trust	Trust and understanding	One feels supported and accepted, but may be frustrated, if there is lack of the expertise to derive own solutions.
Joint problem solving	Joint commitment, mutual influence	One is committed to planning and to implementing solutions. Leads to synergy - high quality output but time consuming in short-term.

In any given situation, it is possible for everyone to exert influence or for no one to have influence. In the former case people are collaborating to at least a limited extent, whereas in the latter case people are either blocking influence attempts to one another or failing to find common ground. It is common for people to approach others in terms of "You haven't given me anything (any concessions), so I won't concede anything to you". Thus people covertly block one another's efforts to get what they want or meet their personal needs, resulting in frustration or conflict.

[a] Identification rather than accepting influence because you see another as "ideal" or someone you would like to be like.

4

TRAINING FOR WOMEN

PART IV - TRAINING FOR WOMEN

The purpose of any training is to change the behaviour of the people being trained in certain specific ways. A crucial part of designing any training activity is the establishment of the objectives (short-term, long-term and hidden) of those doing the training.

The Women and Development Programme gave a great deal of thought to the training courses we developed. As we particularly wanted to place the training within the philosophical framework of training for development of self-reliance, self-sufficiency and change, we included several information sessions which attempted to point up the broader "political" implications of training for women. We particularly wanted to give trainers an opportunity to evaluate their programmes' past impact on women's lives, reflect on changes in direction to meet the development needs of women and their own role as agents of change.

We include in this section the objectives, agenda, learning reviews and various information sessions we used to add the extra dimension to our training courses for women trainers.

1. OBJECTIVES FOR WORKSHOP *

a) To bring together professional and/or experienced trainers who are or will become responsible for training personnel working in Women and Development Programmes, especially front-line workers.

b) To enable participants to assess the effects of the training programme they are already involved in and to share their experience with that of other trainers.

c) To develop individual work plans for implementing in their country training programmes.

d) To help participants to identify, investigate and practise training styles and skills which will be appropriate for use in their work in their own country.

e) To help participants to acquire a deeper understanding of the role of training in ensuring that women are able to play a full part in the development of their countries.

f) To ensure that trainers are aware of the need to place training in the context of local cultures, national development strategies and pan-Commonwealth policies.

g) To extend participants' knowledge of teaching/learning aids and to enable them to choose and test the application of new training techniques for their own work.

* The content of this page also forms Paper 8, "Objectives for Workshop".

2. PROGRAMME

WEEK 1

DAY 1: MONDAY	DAY 2: TUESDAY	DAY 3: WEDNESDAY	DAY 4: THURSDAY	DAY 5: FRIDAY
	Learning	reviews	small	groups
Opening ceremony 1. Training in the context of Women and Development issues	5. Skills needed by trainers 6. Assessing training needs and designing programmes	8. Group projects Assessing training needs and designing programmes	11. Objectives	13. Case studies 14. Discussion-leading
L	U	N	C	H
2. Sharing work experiences 3. Hopes and fears 4. Contracting	7. Influence (1) gaining entry	9. Selecting your training method 10. Using training methods	12. Influence (2): flexibility of influence style	FREE
Learning	reviews	-	small	groups

WEEK 2

DAY 6: MONDAY	DAY 7: TUESDAY	DAY 8: WEDNESDAY	DAY 9: THURSDAY	DAY 10: FRIDAY
Learning	reviews	- small	groups	
15. How groups work: Fishbowl exercise	17. Practical session: Presentations	19. Participant presentations	20. How adults learn 21. Learning by doing 22. Negotiating	24. Building self-confidence (2) 25. Community mobilisation
L	U	N	C	H
16. Influence (3) Being influential in a group	18. Facilitating, counselling and non-directive work	FREE	23. Building self-confidence (1)	26. Field trip
Learning	reviews	-	small	groups

WEEK 3

DAY 11: MONDAY	DAY 12: TUESDAY	DAY 13: WEDNESDAY
Learning	reviews - small	groups
27. Regional and other training agencies 28. Training policy and costing	30. Using training manuals 31. Report writing	33. <u>PLANNING NEW TRAINING</u> Applying principles learnt on course to work at home
L U	N	C H
29. Influence re-runs	32. Evaluation techniques 33. <u>PLANNING NEW TRAINING</u>	34. Workshop review
Learning	reviews - small	groups

3. LEARNING REVIEWS

As already mentioned in the Training Notes, we found regular learning reviews very useful for three reasons:

a) they reminded us of what we had learned;

b) they indicated new learning goals; and

c) they proved useful in dealing with any problems which arose during the workshop.

We held learning reviews at the end of each day in short courses, with a brief report back from each group at the beginning of the following day. In longer courses, we held daily learning reviews until the pattern was established, then every second day as convenient.

There will be few problems in scheduling a learning review in a course where everyone is staying in the same place. Difficulties can arise where some participants or tutors are not resident, and some compromise will be necessary. We sometimes held the learning review at the end of the afternoon session, not a good time for tired trainees, but better than _no_ learning review!

The other important factor is that learning reviews should be held in the same groups throughout the course. This means that the tutors' decisions in allocating participants to groups on the first day of the course need to be taken carefully, with a view to balancing different factors within the groups (such as nationality, skills, language, etc.). The idea behind keeping the same learning review groups is that:

a) the trust which begins at the contracting stage on the first day continues to grow throughout the course; and

b) that participants have one group which is stable for the duration of the course whereas their other working groups will often be changed.

DAY 1

30 mins

LEARNING REVIEW

Remain in the same subgroups as for contracting, and when the contracts have been established move into the learning review.

Tutors explain the purpose and method of the learning reviews:

- for individuals in each group to identify (and re-identify throughout the course) their learning needs;

- to share these learning needs with the rest of the group and to keep a note of them (on newsprint or blackboard if they can stay in the same syndicate room for the whole course);

- to meet every evening to review their personal learning during the day, particularly in the light of the learning needs;

- to present this learning to the whole course at the plenary learning review first thing the following morning;

- to give feedback to the tutors on the impact, effectiveness and relevance of the course during that day.

The subgroup then carries out these aims.

In this learning review, the groups should also discuss approaches to handling feedback after the role-playing exercises, basing the discussion on reactions from participants to the way the tutor handled feedback during the day's exercises.

Keep it light, supportive and brief. This is really still contracting and it's best to discuss it briefly and then get on with it to dispel remaining anxieties by demonstrating that it doesn't hurt too much!

The tutor keeps a running note on each individual throughout the course.

DAY 2

30 mins

LEARNING REVIEW

Short presentation from a spokeswoman from each subgroup on the main points of their learning review the evening before.

Brief general discussion chaired by the course director.

4. INFORMATION SESSIONS

TRAINING IN THE CONTEXT OF WOMEN AND DEVELOPMENT

Some issues

30 mins

After the official opening session of the workshop, a brief outline of the issues facing women in the Commonwealth and in the wider global sense is given to the participants, emphasising the importance of the societal and community roles and needs of women.

The importance of the trainer's role as an agent of change should be brought out here, as well as the desirability of building self-reliance and independence.

The paper on "Issues" in the Tutor's Manual - Influence Skills for Women, also published by the Commonwealth Secretariat, may be a helpful basis for this session.

COMMUNITY MOBILISATION

Objectives	Tutors: 1. To draw out participants' experiences in motivating and encouraging women's groups and individual women to participate in and contribute fully to community projects and activities.	
Document	Paper 42: "Methods of Assessing the needs and Improving the Impact of Women in Developing Projects".	
Time	1 hour 30 minutes	
Method	Presentation and discussion. A woman with experience in community work, in planning and establishing projects and working with women in a variety of groups, talks about the principles of successful motivation and mobilisation of community projects and invites comments (and shared experiences) from participants.	Principles: 1.Use of examples so that comments are relevant to participants. 2.Methods of including women in all projects and initiating new projects. 3.Identification of wants and needs: who does it and how. 4.Importance of not imposing ideas on women. 5.Relevance of projects to women's lives. 6.Knowledge of principles of communication and how to use them. 7.Sharing of experiences.

PAPER 42

DISCUSSION PAPER: METHODS OF ASSESSING THE NEEDS AND IMPROVING THE IMPACT OF WOMEN IN DEVELOPING PROJECTS

1. INTRODUCTION

Although a definite relationship should exist between assessing needs, developing, implementing, monitoring, evaluating and subsequently improving projects (see the chart on page 237), in practice this is rarely the case. Despite the lip-service often paid to communal considerations, to the social economic and political relationships in village society and to the roles of women and men within those relationships, the application of development strategies in general and projects in particular are generally based upon a set of premises outlined and developed by members of developed nations, international organisations or funding agencies - invariably men - that are completely alien to the society where the programmes and projects are being introduced: i.e. "this is not what you need but what we think you need." Further, although such terms as "planning from below" and "real needs" are frequently used in development plans in recognition of the need for villagers of both sexes to have a say in their own development, most programmes and projects implemented thus far are not free of the biases of the policy makers and planners from outside the region, with the result that projects developed and implemented tend not to be the work of women and/or men clamouring for development but are rather the stereotyped responses to problem solving.
In an attempt to redress the balance partially this discussion paper looks at a possible framework that could be used in assessing the needs of women in development projects, as well as examining methods by which the impact of women in development projects can be improved.

2. ASSESSING THE NEEDS OF WOMEN IN DEVELOPMENT PROJECTS

A framework for assessing the needs of women in development projects is given in the table on page 238. The same framework can be used in evaluating the effects of development projects on women. The direct target group are those to whose needs a project would directly cater, while the indirect target group are those whose needs may also be affected through the implementation of a project.

A. Physical needs

(1) Access to food, water and fuel This category must also include the traditional role played by women in agricultural production, processing and distribution to prevent unintended consequences in preparing projects.

(2) Housing Because in most societies women spend more hours per day on average in the home than away from it, any positive or negative change in housing quality is likely to affect them intensely. For example, any housing construction resettlement scheme must take place following consultation with future residents, notably in respect of design and location.

(3) Environmental quality Included under this category is the need for sanitary facilities, adequate drainage, the degree of air and water contamination and the prevalence of environmentally based diseases.

(4) Medical care Because access to medical resources is usually distributed unevenly within and across households in addition to cultural restrictions on women's access to medical care, the development of any health project must have a clear woman's component.

(5) Personal safety One cannot stress this component enough. It includes the degree of exposure to, and protection from, personal violence, accident and injury. Land clearing and agricultural extension, for example, often take place a long way from the village across difficult terrain, exposing women to even more hardships.

(6) Rest and leisure This category can be measured by the energy needed and time of labour required for production for household consumption, or for sale or exchange as well as by the number of hours available for rest, leisure and sleep. Projects which may be developed to satisfy other needs, i.e. to increase agricultural production, often fail, because the amount of time already devoted by women in agriculture is not taken into account.

B. Economic needs

(1) Income in cash, kind or trade in relation to the cost of living In addition to the level of household income, the question of who earns the income and in what proportion to the total is crucial to the understanding of the domestic economy, and to project preparation. Often projects increase women's unpaid labour but not their paid labour.

(2) Access to credit Most projects designed to provide new sources of credit consider the household as a unit and the male as its head, with the result that while women do the work they are unable to control the financial decisions necessary for successful implementation.

(3) Land and water rights Traditionally, little attention is given in projects concerned with land redistribution to the distribution of land rights within the household.

(4) Technology and technical assistance Women are usually omitted from participating in technologically biased projects, in part because, as workers, they are concentrated in sectors of the economy such as subsistence agriculture, handicrafts or small-scale marketing that are bypassed by most technical assistance programmes. One way to begin to correct these inequities would be to train women in all aspects of technical assistance in order to reach women producers with the appropriate technical information.

(5) Other assets in relation to debts Women rarely have control of assets, even in projects which are ostensibly women-orientated.

C. Social needs

(1) Knowledge This component includes skills specific to the performance of certain tasks, as well as more general knowledge. One must ensure that any educational and vocational schemes benefit women to the same extent as men.

(2) Power This component includes autonomy, participation in household and community decision making, and mobilisation for group action. Projects must be developed to enhance all these components.

(3) Prestige "We have no special skills; nothing we do is worth selling" is a typical response of women which must be changed. Projects designed should attempt to change the self-deprecating value judgements.

3. IMPROVING THE IMPACT OF WOMEN IN DEVELOPMENT PROJECTS

The framework outlined above for assessing and evaluating needs of women in development projects can be used in improving the impact of development projects in two major ways. Regarding the assessment component, the framework can be incorporated into the project identification stage (see the chart on page 237) in order to make sure that better projects are developed in future. With respect to the evaluation component, this can be used to modify and improve the project that is being implemented.

In addition, the impact of development projects can be aided in the following ways:

A. Increased participation in project decision making

Four areas can be isolated.

(1) Increased administration of projects through women's sections of government ministries, through women's Private Voluntary Organisations and through national women's associations rather than through general PVOs or government agencies.

(2) Less affiliation of women's programmes with larger, male-dominated institutions, since in large institutions decision making on major policy issues tends to be transferred to men.

(3) Increased location of projects in communities with indigenous formal or informal women's associations and in communities where there is a strong tradition of community self-help.

(4) Increased activity of poorer families in group discussions which set the project priorities since they are the most likely to identify their most pressing needs.

B. Increased access to project activities

(1) More access to and influence on those planners who explicitly recognise the prevailing sexual division of labour and design activities that build on women's work and enable them to control their earnings.

(2) Increased activities that fit with prevailing cultural norms and the allocation of household responsibilities, since these reduce resistance from men.

(3) Less rigid organisation of women's rights to resources such as land, credit or schooling.

(4) More recruitment of volunteers and trained female staff to development projects.

C. Increased effect of the project on women

1) Increased group action by women, especially those who are confined to their households and thus unused to collective activity.

(2) Increased activity towards co-operative efforts being geared to a single project that carries clear and immediate benefits, rather than diversification.

(3) More development in projects with a concrete economic benefit, since that appears to be a major motivating factor for maintaining group activity.

(4) More development in the marketing aspects of projects, since that is one of the most difficult obstacles to creating viable economic enterprises based on the small-scale production of most rural women's projects.

(5) More specific identification of girls and women in project papers.

CHART: SCHEMATIC REPRESENTATION OF PLANNING ACTIVITIES

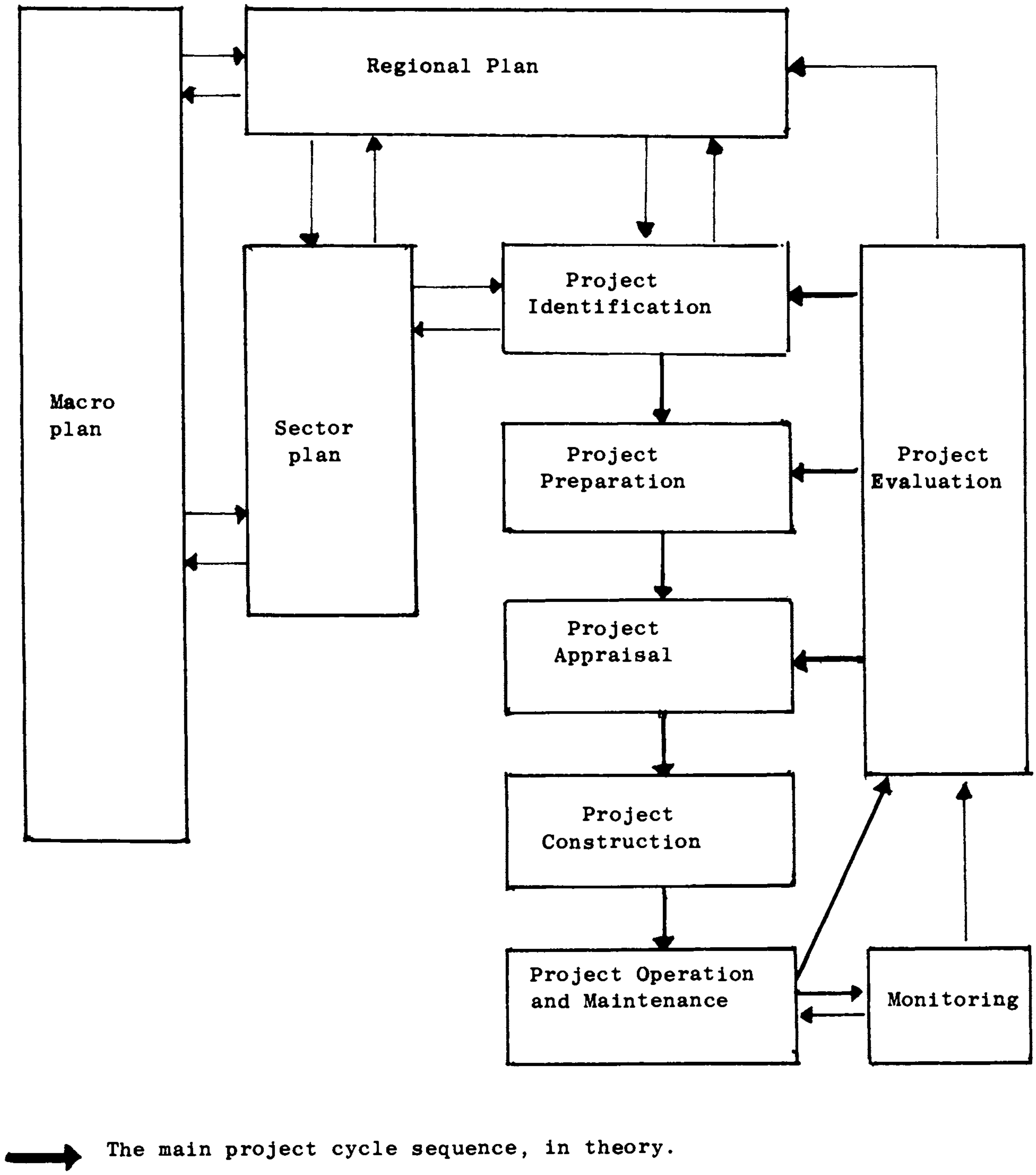

TABLE: FRAMEWORK FOR ASSESSING/EVALUATING[a] NEEDS OF WOMEN IN DEVELOPMENT PROJECTS

Resources that determine	Direct Target Group		Indirect Target Group	
	Before Project[a]	After Project[a]	Before Project[a]	After Project[a]
A. Physical needs				
1. Food, water, fuel				
2. Housing				
3. Environmental quality				
4. Medical care				
5. Personal safety				
6. Rest and leisure				
B. Economic needs				
1. Income/cost of living				
2. Credit				
3. Land and water				
4. Technology				
5. Other assets/debts				
C. Social needs				
1. Knowledge				
2. Power				
3. Prestige				

[a] Delete as applicable.

Printed and published by
The Commonwealth Secretariat

May be purchased from
Commonwealth Secretariat Publications
Marlborough House
London SW1Y 5HX

ISBN 0 85092 253 4

ISBN 978-1-84859-373-2