Twelve Tips:
Providing Interactive Training and Facilitation for Ryan White HIV/AIDS Program Part A Planning Councils/Bodies*

Focus: Use active learning techniques in training PC/B members or other community members, because:

- **People learn best by doing – practicing and applying new skills and knowledge**. Provide opportunities in the sessions for participants to use the material presented – to discuss, understand, and apply what they have learned.
- **Adult training needs and learning styles are different from those of children**. Adults have a lot of real-life experience, and they retain knowledge and skills best when they see how they can be applied to real-life situations that matter to them.
- **Learning increases when training methods make participants responsible for their own learning.** Lecturing puts the entire responsibility for training success on your shoulders as trainer – it is up to you to engage and involve participants. When participants work individually or in small groups to assess situations, solve problems, and practice skills, they take primary responsibility for their learning and are generally more engaged and learn more.

Twelve Tips: The following tips summarize ways to provide interactive training and suggest ways to make your orientation and training sessions both interesting and effective.

1. **Wherever possible, use a team to plan and provide orientation and training.** This provides diverse input into training content and style, makes for a more interesting and interactive session, and shares the work. Ideally, new member orientation should include PC/B leadership, including PLWH/consumer leadership, in both planning and delivery. Some PC/Bs do an annual training plan, with plan development by a team including the responsible committee (often Membership) and ensuring representation of consumers, at least one veteran member who knows from experience about training needs, provider perspectives, and a recipient representative, as well as Planning Council Support (PCS) staff – with at least one person with some experience in doing interactive training. For orientation, PC/B leadership should participate in the training. In addition, ask the recipient to explain how the recipient works with the PC/B, and have an active consumer talk about individual roles and responsibilities and the key role of consumers and other PLWH. Ask Committee Chairs to serve as resource people in small groups.

2. **Remember that members are "adult learners" who share some important learning characteristics.** Research has shown that adults typically:
   - Bring to training a strong sense of purpose—they tend to focus on how what they learn can be used in real-life situations (like planning body meetings).
   - Are self-directed and motivated, provided the training is relevant to their needs.
   - Have considerable life experience that serves as an important resource for their own

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learning and for other members of the group.

- React best to a training model in which they are active partners, not passive recipients.

3. **Assess member needs as you plan the training.** This ensures that you understand the range of knowledge, skills, and experience among the group you will be training. Some members may have extensive experience in particular topic areas. If so, enlist them as co-trainers, to share their expertise with others. To guide you in deciding what topics to emphasize, consider preparing a brief needs and skills assessment for members to complete and return several weeks before the training. List topics you expect to cover and ask members to indicate their level of need for training in each topic, perhaps using a four-point scale. Sample questions are included below.

   If knowledge and skill levels of participants are quite varied, use of small groups may be particularly effective in helping them learn from each other. Lecture methods may be particularly ineffective. This is because listening to you present information appropriate for those who have the least experience would leave others bored. Small groups allow you to group participants according to experience level or use mixed groups so they can learn from and help each other.

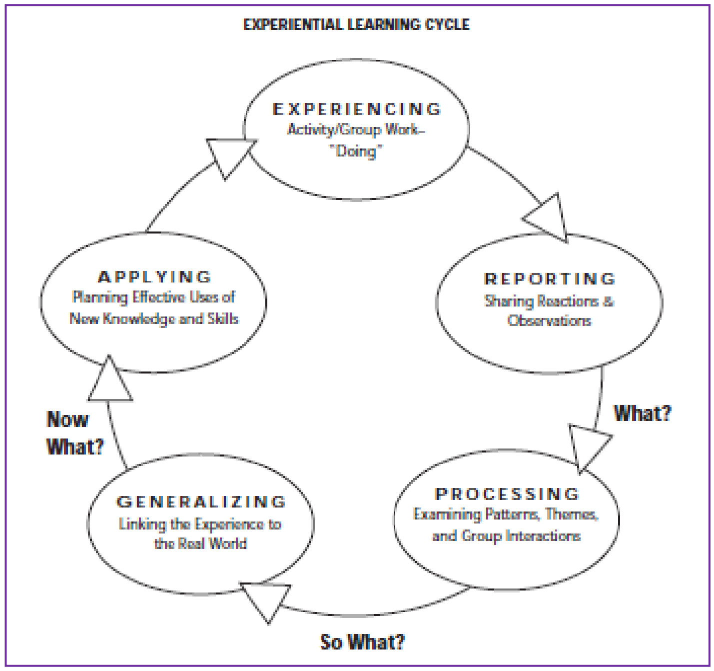
4. **Use training methods that maximize retention.** Research shows that people learn best when they are actively involved in their own learning. This can involve discussing new information, practicing skills, and teaching others. Design your training sessions to minimize the use of passive methods like lecturettes (which lead to very low retention), and maximize the use of problem solving and other active learning methods.

5. **Because people learn in different ways, provide varied learning opportunities to fit different learning styles.** For example, you might want to:
   - Combine individual and small-group activities.
   - Appeal to many senses and use multi-media approaches. Be sure people can see summaries of major points by putting them on PowerPoint slides or easel pad paper (often called "newsprint"). Describe major points and provide examples for participants; use videos for multi-media effects where feasible. Have small groups prepare newsprint summaries as they work; it helps groups focus their efforts, facilitates reporting to the full group, and improves retention.
   - Use both cooperative and competitive approaches. Some people benefit from asking individual questions and answering the trainer's questions in a full group. Others are more comfortable working cooperatively in a small group and rarely speak up in a group of more than four or five people. Research indicates that some cultural groups often find cooperative approaches especially comfortable and appropriate – and also shows that groups are often superior to individuals in planning and problem solving.
   - Use both inductive methods (building a model step by step) and deductive methods (starting with the whole model and breaking it down into components).

6. **Use the experiential learning model (presented below) to guide your training.** It addresses most of the needs and interests of adults, and uses methods that lead to high retention. When you present a segment of training, provide an opportunity for participants to

experience the skill or information (such as small-group work on some aspect of the topic). Then have participants *report* on their experience, discuss (*process*) the experience in the full group, and *generalize* what has been learned in terms of its practical use as part of their responsibilities as planning body members. This can help ensure that they have opportunities to *apply* the knowledge or skill in a committee or planning body meeting or related community activity. If your training group is small (six or fewer), they can work together on experiential activities. Subdivide a larger group so everyone participates.

Remember that a learning activity involves both *content* (the information or skills being taught) and *structure* (how the content is presented). Using small groups is important because many people learn better and are better at problem solving in cooperative groups than in individual competitive situations. You or a Co-Chair may provide "lecturettes" and guide the group, but participants should have opportunities to learn from each other.



Be sure to assign roles for each small-group task, such as the following:

- **Facilitator –** the person who coordinates the work of the group and ensures that everyone participates equitably, as well as participating
- **Recorder –** the person who writes down main points from the discussion and records the decisions of the small group, often on easel paper
- **Reporter** – the person who presents a summary of the work and decisions of the small group to the full group [It is often a good idea to ask that the most senior member of a group, such as the PC/B Chair or Co-Chairs, NOT serve as reporters, so others take responsibility and gain valuable experience in reporting]

Sometimes it can be helpful to have an **observer** in each group, someone who watches how group members interact and then reports back to the small group and full group. This is particularly helpful when one of your training purposes is team building.

7. **Focus on helping members learn or strengthen skills they will need as part of their planning body responsibilities.** This includes both group process skills like techniques for effective meetings and content-focused skills like managing conflict of interest and planning needs assessments. Skills need careful introduction so the participants both see the whole skill and understand its component parts. One way to approach the teaching of skills is to use the following steps, which reflect the experiential model. Almost any skill can be presented by following these steps:

- *Introduce the skill* to be learned. Suppose you wanted participants to learn how to plan and conduct a PLWH survey as part of a needs assessment. Provide background on why needs assessments are important to a PC/B in deciding upon service priorities and allocating limited resources.
- *Show the whole skill.* Show what a completed needs assessment survey looks like, in terms of both content and format for presenting results. Do this by sharing your most recent PLWH survey. Show the report's executive summary and table of contents, and your PowerPoint presentation.
- *Show and tell.* Present various segments of the skill. Describe the steps in planning and implementing a PLWH survey. For *planning:* determine the scope of the needs assessment (e.g. just PLWH in care, or also individuals who are out of care), discuss the uses of the data, determine the timetable and budget, agree on responsibilities for conducting and overseeing the survey, and establish a process for community input to the design. For *design:* determine what type of survey and data collection methods to use (e.g., online and paper, available on tablets, use of trainer PLWH to administer the survey, translation into other languages), design the survey instrument, determine how many people will be interviewed and their characteristics, decide how PLWH will be identified (e.g., through service providers, PLWH groups, social media), arrange for incentives such as gift cards if they will be used, and determine how information will be analyzed. For *implementation*: arrange cooperation from providers and other entities, train PLWH who will help administer the survey, administer the survey, review progress, target under-represented groups to complete data collection. For *analysis and presentation*: aggregate and analyze responses to closed-ended questions, review and do content analysis of qualitative data from open-ended questions, compare findings with other available data, and organize and present results through a report and a presentation to the PC/B.

Steps in Teaching a Skill

1. Introduce the skill
2. Show the whole skill
3. Show and tell the various segments of the skill
4. Check the group's understanding
5. Provide for practice
6. Emphasize the practical importance of the skill
7. Provide an opportunity to use or apply the whole skill
8. Conclude and summarize

- *Check the group's understanding.* Ask questions for the group to answer so you are sure you have been successful in your presentation: In a PLWH survey, what are some methods that might be used to obtain input from PLWH who know their status but are not receiving primary health care or were recently out of care? Give participants a chance to try using the developing skill. For example, as a full group, have participants suggest ways to identify and gather information from several specific populations, such as the homeless, individuals who are substance users, the recently incarcerated, or young MSM.
- *Provide for practice.* Have small groups prepare and present plans for different components of the needs assessment – e.g., instrument development and pretesting,

identification of subpopulations to oversample, a process to find PLWH to survey, training and management of the survey team, data analysis. Then have them present their plans to the full group and critique each other. Ask them to identify roles PC/B members need to play in helping ensure that the needs assessment reaches the diverse groups reflecting the local epidemic. As trainer, answer questions, provide hints, and help participants link the various components of the survey.

- *Emphasize the practical importance of the skill.* Discuss why this needs assessment is so important to the PC/B in its decision making. Have the group consider what might happen if the planning body did not have adequate needs assessment data when it got ready to do priority setting and resource allocations.
- *Provide an opportunity to use/apply the whole skill.* For example, have small groups outline a design for a PLWH survey. If the PC/B is about to conduct a PLWH survey, work with the Needs Assessment Committee to provide the training as a way to begin the planning process. This can help prepare additional members to serve on the committee and participate in the actual needs assessment process.
- *Conclude and summarize*. Provide hints and re-emphasize the main points, and describe how the participants will have the opportunity to participate in the PC/B's needs assessment process.

8. **Plan training in detail, then modify your plan if necessary.** Develop a detailed agenda, with objectives, experiential activities, reference materials, and an assessment form to get feedback on what people learned and how they felt about the training. If you are using several trainers, prepare together and be clear on your roles. However, be prepared to make adjustments during the session. You might need to spend more time on some topics and less on others, revise group activities, and allow time for in-depth discussion on an issue of special importance to the group. It is easier to make quick adjustments when you have a very clear agenda and schedule than when you have only a general agenda.

9. **If you use outside presenters, prepare them to be part of an interactive session.** Meet with them ahead of the training, share the overall format and objectives, and emphasize the importance of involving participants, not just lecturing to them. If a presenter is not comfortable with developing interactive approaches, work together to see what kind of small-group or other experiential activity you can prepare for use along with a lecture or panel presentation. For any lecture or panel, allow time for questions; this may require being very strict about time allocated for the lecture portion of the presentation. One of the challenges of PC/B training is ensuring member attendance. Ensuring that your training sessions are consistently interactive and engaging can greatly increase attendance and training success.

10. **Understand and differentiate trainer and facilitator roles.** Providing member training is likely to require several distinct types of sessions. Some may involve a traditional trainer role, others a facilitator, still others a combination.

    - **Traditional Trainer Role:** Much of the member training is likely to focus on knowledge and skill development. These sessions prepare participants to be active, informed PC/B members and to be comfortable participating actively in committees and in full PC/B discussion and decision-making. The trainer is expected to be well versed in the topic area, to help members to develop and practice new skills and learn new knowledge, answer questions and provide examples, and ensure that all members share their related knowledge and experience.

- **Facilitator Role:** Because participants are planning body members, some sessions may be used to do a combination of training and planning and decision making. In such situations, the trainer serves a coordinating or facilitating role. For example, the group may be planning how to improve PLWH recruitment or doing a small-group activity to develop approaches for reaching certain populations as part of a needs assessment. The situation is similar to a planning body meeting involving an outside facilitator. The participants themselves are responsible for the decision making; the facilitator helps them to consider appropriate issues, ensures open and thorough discussion, and provides knowledge and in some cases does some skill transfer. Training skills are certainly needed, but the primary responsibility for making decisions remains with the group. The group must come to a decision that fits its needs and that it "owns" because participants went through a careful decision-making process. The facilitator should not attempt to impose a solution on the group. The group must implement its decisions and live with them.
- **Combining Roles:** There is, of course, considerable overlap between the two types of roles. Even if the focus of a session is decision making, it usually requires some skill training segments to ensure that members have the information and skills needed to make decisions and plan strategies. Moreover, an effective facilitator will certainly let a group know if a decision being considered seems very unlikely to succeed. But the facilitator will do this through providing additional information and helping the group to consider it through a rational review process—not by telling the group what it should do.

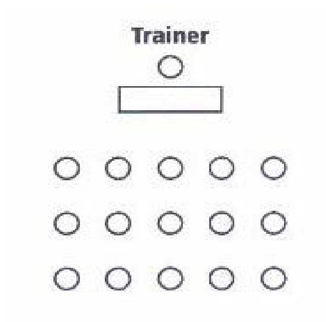
An effective trainer carrying out skill training will often adopt a facilitator role, especially when using small groups to help participants learn from each other and practice new skills. Learning skills requires trying out the skills, and a facilitating role is important to encourage and build on experiential learning. Thus, both roles are usually needed in each type of session. However, the primary purpose of the session should determine which approach dominates.

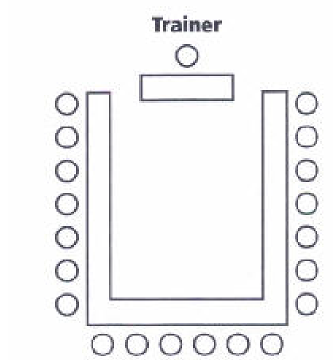
11. **Pay attention to room set-up and equipment.** They can make a big difference.
The following equipment and materials will probably be needed for your training sessions:
    - **A PowerPoint projector for PowerPoints or materials that need to be visible to everyone.** Avoid trying to put too much information on a single slide, use large and easy to read fonts (24 points is a good minimum type size). Use slides to list main points and keep you on track, but avoid reading from the slides or you will find your audience reading for themselves rather than listening to you.
    - **Easel pads**, to illustrate points, summarize decisions, and record key points during small-group sessions. Whiteboards can be used, but are not nearly as practical because they have to be erased and therefore are not available throughout the session. Nor can they be taken home and typed or reviewed later.

- **Magic markers.** Try to be sure you have several very dark, new, thick black or blue ones, since other colors are often less visible, especially if the group is large.
- **Masking tape,** for hanging newsprint around the training room – unless your pads are self-adhesive. Your training area looks much more interesting once some small-group products have been taped to the walls, and some information will need to be available for ongoing reference.

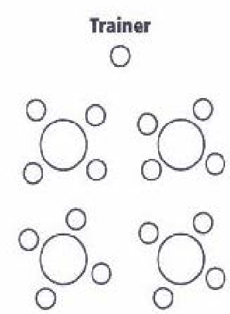
The seating arrangement of the training room is as important as your equipment and materials. Determining this arrangement is usually a trainer responsibility. Since your orientation and training should be highly interactive and participatory, you will want a room arrangement that encourages participation.

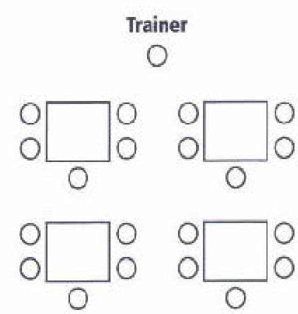
- Avoid a seating arrangement that sets the trainer apart as the only source of information and discourages participant involvement, or any format that doesn't allow groups to separate themselves into small groups – such as the following:





- Use an arrangement that enables members to work comfortably both in small groups and as a full group. For example:





12. Always evaluate your training sessions, so you can improve them over time.

An important component of your orientation and training is some form of evaluation. There is no single correct format or content for orientation and training evaluation. Generally, PC/Bs like brief written forms with a combination of rating scales and open-ended questions, along with group discussion of the perceived value and quality of the training. If you use multiple sessions, consider including a brief evaluation form at the end of each session. If you do a full-day or multi-day session, it may be sufficient to obtain verbal feedback during the session and use one evaluation form at the end of the training.

If participants are not expected to put their names on forms, they are likely to be more comfortable providing honest information about the training.

Your evaluation form should fit the objectives of the training and provide the information needed to:

- Understand what is "working" and "not working" in your member orientation and training;
- Get a sense of what members have learned and how they feel about the process;
- Improve member orientation and training design and delivery in the future; and
- Determine other member training needs

Aggregate responses to rating scales and determine mean (numerical average) ratings, and summarize comments as soon as possible after the training. Share the summary results with the training participants, and use them to review/debrief, and to strengthen future training.