Training Techniques and Aids for Trainers and Facilitators

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Updated for use with the
Training Guide for RWHAP Part A Planning Councils/Planning Bodies: A Member's First Planning Cycle

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I. Introduction

The information provided here is designed to support Planning Council/Planning Body (PC/PB) Support staff, PC/PB members, and others – especially those with limited training or facilitation experience – in planning and providing orientation and training for current and potential members of PC/PBs and their committees.

The materials have been developed and refined over many years for use in many types of training and technical assistance by both experienced and new trainers and facilitators. This version is designed specifically for use along with the *Training Guide for Ryan White HIV/AIDS Program (RWHAP) Planning Councils/Planning Bodies (PC/PBs): A Member's First Planning Cycle,* prepared as part of JSI's Planning CHATT (Community HIV/AIDS Technical Assistance and Training) Project, and hereafter referred to as the *Training Guide*. *Training Guide* materials provide the "content" for member orientation and training – from full-day new member orientations to 15-minute mini-training sessions during PC/PB or committee meetings. These training aids can help you develop agendas and training objectives; choose content from existing PowerPoints, activities, and reference handouts; develop your own materials; and implement clear, interesting, relevant, experiential training. The basic concepts apply broadly to training of adults; the examples used are RWHAP-specific.

These training aids are likely to be helpful if you:

- Have limited time and resources available for developing training materials;
- Have little or no experience in developing experiential activities that help participants "learn by doing";
- Have experience primarily giving speeches and presentations rather than interactive training;
- Expect to use a team of trainers/facilitators with varied experience; and/or
- Plan to hire an external trainer or facilitator but are not sure what to look for.

This package of training aids includes information and tools that address the following:

- Trainer, facilitator, and presenter roles
- Core and additional trainer/facilitator skills
- Up-to-date information on adult learning models and practices, including references and web links for some particularly useful articles
- Interactive learning methods, including use of small groups and various types of experiential activities, including reference to examples in the *Training Guide*
- Suggestions for assessing training needs
- Questions to ask a potential training consultant
- Ways to make training experiential, engaging, and appropriate for diverse participants and groups
- Development of each component of a comprehensive training "package"
- Training equipment, materials, and room arrangements, including technology for remote training

II. Training Roles and Skills

A. Differentiating Presenter, Trainer, and Facilitator Roles

PC/PB orientation and training are used to provide information and increase participants' understanding of their roles and skills to fulfill them. The term "trainer" is often used for the leader of a session or course that is provided outside traditional educational settings like schools. However at least three different roles are involved: presenter, trainer, and facilitator. Different types of sessions involve different roles, and sometimes the same session may call for a combination of roles. It can be helpful to consider these different roles and the knowledge and skills needed to fill them successfully.

- **Presenter:** A session that focuses on information or "fact" sharing needs a presenter who knows a lot about the subject – ideally an expert – who is able to present information clearly and answer questions**.** Interaction usually involves primarily questions and discussion, rather than experiential activities, so it is helpful but not essential that the presenter also have training skills.

- **Trainer:** Sessions that focus on building participant knowledge and skills require a trainer who understands both the content or subject matter and the training process. The trainer is expected to transmit knowledge and experience, encourage participants to share their own related knowledge and experience, and help participants to develop and practice new skills that will be applied within the PC/PB or committee. Such sessions typically include a combination of brief presentations ("lecturettes") and experiential activities like quizzes, scenarios, worksheets, and/or role plays. The trainer needs to be able to form and manage small groups and help participants report, analyze, and learn from these activities.

- **Facilitator:** Sometimes training sessions are designed to include discussion and decision making. For example, a PC/PB committee may meet to agree on a refined process for the assessment of the efficiency of the administration mechanism (AAM), or the PC/PB may plan a full-day priority-setting and resource allocation process. PC/PB Chairs or committee chairs may ask for PC/PB Support (PCS) staff or an outside person to serve as facilitator, helping the group go through an appropriate and efficient process and make sound decisions. The facilitator should have some subject matter knowledge, but need not be an expert. The primary responsibility for making decisions remains with the group. The facilitator helps participants consider appropriate factors and models, manages open and thorough discussion, provides guidance about Health Resources and Services Administration's HIV/AIDS Bureau (HRSA/HAB) expectations or established PC/PB policies and procedures, and guides the process for decision making. An effective facilitator will help the group identify possible problems with a solution that is being considered – but will do this by providing additional information and helping the group use a balanced and thorough review process, not by telling the group what it should do.

- **Combined Roles:** There is considerable overlap among the three roles – and often trainers (including PCS staff) can play all three. A PC/PB new member orientation may require a presentation on PC/PB roles, responsibilities, and boundaries; skills development training through use of scenarios and a role play, and facilitation of a discussion about committee assignments. Skills-focused training often begins with a presentation and then moves to small-group work activity. The trainer may adopt a facilitator role to help participants learn from each other and encourage practice of new skills in small groups. The key objectives of the session – new knowledge, skills, and/or reaching decisions – should determine which role to emphasize.

- **Teams:** Often using a team is the best approach because no one individual is comfortable playing all the needed roles. For example, PCS staff may want a subject matter expert to present information on a topic like Conflict of Interest (COI) or use of the AIDS Drug Assistance Program (ADAP) to pay insurance premiums. Staff take responsibility for planning and coordinating the training and for managing small-group work to test and apply knowledge and skills that build on the presentation. In addition, use of a team is helpful for any training of more than an hour or two. Differences in team member background, areas of expertise, style, and approach help keep participants engaged. Of course, teams need to agree on roles and be sure they have a shared understanding of training objectives and the roles of teach team member.

B. Trainer/Facilitator Skills

A trainer/facilitator should be able to do many things well, and often at the same time. Here are some basic skills needed by PC/PB Support staff or others who provide orientation and training to PC/PBs. They are divided into core skills to work on in preparing for training or facilitation, and additional skills to develop with time and experience.

Core Skills

- Provide training using existing training materials (like the modules in the *Training Guide*) – identify needed materials and put them together into a cohesive training package.
- Refine existing materials for use with your PC/PB – using the names of your committees, modifying scenarios to fit your local situation, etc.
- Train or facilitate both alone and with others (e.g., PC Support Manager and PC Chair), dividing responsibilities and working collaboratively.
- Work with participants to agree on workable groundrules – and then enforce them, with the help of a PC/PB leader if necessary.
- Provide a comfortable training environment where participants feel valued and included.
- Involve and engage culturally diverse participants.
- Present clear “lecturettes” – short presentations using PowerPoint slides or notes.
- Predict and be ready to handle typical questions and comments – and know when/how to say you don’t have the answer but will provide it later.

- Use several different types of already-developed experiential activities, such as scenarios and worksheets.
- Revise the training agenda during training if necessary.
- Observe the group and identify potential problems or needs so you can respond to them appropriately.
- Keep training on track and on schedule – with the help of a timekeeper, if necessary.
- Establish and manage small groups to do activities, with someone assigned to each group to help you.
- Provide energy that motivates participants to learn and participate.

Additional Skills

- Develop your own time-phased training agenda.
- Develop your own training materials.
- Form and use small groups appropriately and effectively – with assigned facilitators, recorders, and reporters.
- Develop, determine timing for, and use a variety of types of experiential training activities – such as quizzes, scenarios, role plays, case studies, and worksheets.
- Use outside speakers or "experts" effectively, even if they lack training experience.
- Demonstrate sensitivity to cultural issues, individual differences, and intergroup concerns.
- Ensure that participants are comfortable stating opinions or asking questions – and addressing difficult issues.
- Play different roles and demonstrate different leadership styles.

III. Training Adults

“What I hear, I forget.
What I see, I remember.
What I do, I understand.”
- Chinese philosopher Xunzi (340-245 BC)

A. Overview

All PC/PB orientation and training, regardless of content, length, or target population, has one common factor: you are training adults. Participants will have varied characteristics, backgrounds, educational experiences, and health planning experience. However, they will all bring to the training a wealth of life experience.

A great deal of research has been done on adult learning styles and models.[1] Among the most important points are the following:

- **Adults learn best by doing – by “making sense of experiences.”** As the quotation from Confucian scholar Xunzi indicates, training for adults is least effective when information is presented only in lecture form, where adults are passive listeners. When participants are actively involved in the learning process through simulations, role plays, or problem-solving tasks, then review and learn from those experiences, the more they learn, remember, and are able to use new knowledge and skills.

- **Adults learn differently from children.** Andragogy (adult learning theory) describes some of these differences.[2] For example, adults are more likely to learn when they feel the training is important and necessary. Training should build on their past learning and experiences. They learn best when they see how the new knowledge and skills applies to real-life situations, like fulfilling their responsibilities as PC/PB or committee members. Training can be especially welcome if provided just before the new learning needs to be applied. For example, PC/PB training on assessing data quality may seem abstract and boring in October, but that same training may seem important and relevant in May, just before the annual data presentation that begins the priority setting and resource allocation (PSRA) process. Adults tend to have a strong self-concept, and want to help direct their own learning. Asking consumers to choose topics for Consumer Committee training will increase their commitment to attending and participating in that training.

[1] For a review of several popular adult learning theories, see “Adult Learning Theories,” TEAL Center Fact Sheet No. 11, 2011, at https://lincs.ed.gov/sites/default/files/11_%20TEAL_Adult_Learning_Theory.pdf.
[2] See Learning Theories, “Andragogy – Adult Learning Theory (Knowles),” at https://www.learning-theories.com/andragogy-adult-learning-theory-knowles.html; or Christopher Pappas, “The Adult Learning Theory – Andragogy – of Malcolm Knowles,” eLearning Industry, May 9, 2013, at https://elearningindustry.com/the-adult-learning-theory-andragogy-of-malcolm-knowles.

- **Learning increases when training methods make participants active partners with responsibility for their own learning.** If you lecture, then the entire responsibility for training success falls on your shoulders. You are expected to interest, inform, and involve participants. If participants are expected to work together to analyze situations, solve problems, and practice skills, then they take primary responsibility for their learning. They learn more, and you serve as an expert advisor, facilitator, and "coach."

B. Experiential Learning

> "Experiential learning occurs when a person engages in some activity, looks back at the activity critically, abstracts some useful insights from the analysis, and puts the result to work…."[3]

Experiential learning is a process through which individuals develop knowledge, skills, and sometimes beliefs and values through direct experiences, which can occur outside the normal classroom setting or involve activities that simulate real-life experiences. The experience itself is not enough, however; the full process is "learning through reflection on doing."[4] Experiential learning requires thinking back on the experience to analyze what happened and why, and using this understanding in future activities. Orientation and training for PC/PB and committee members almost always needs to be experiential, since the focus is on helping people carry out a variety of active roles in HIV community planning.

It helps to have a model to use in planning and delivering orientation and training. Consider using the experiential learning cycle[5] to help guide your training (see following page)**.** The cycle 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 (share) their experience, discuss ("process") the experience in the full group, and generalize what has been learned in terms of its practical use as part in their PC/PB activities. If your training group is small (six or fewer), they can work together on experiential activities. A larger group should be subdivided into smaller groups so everyone participates.

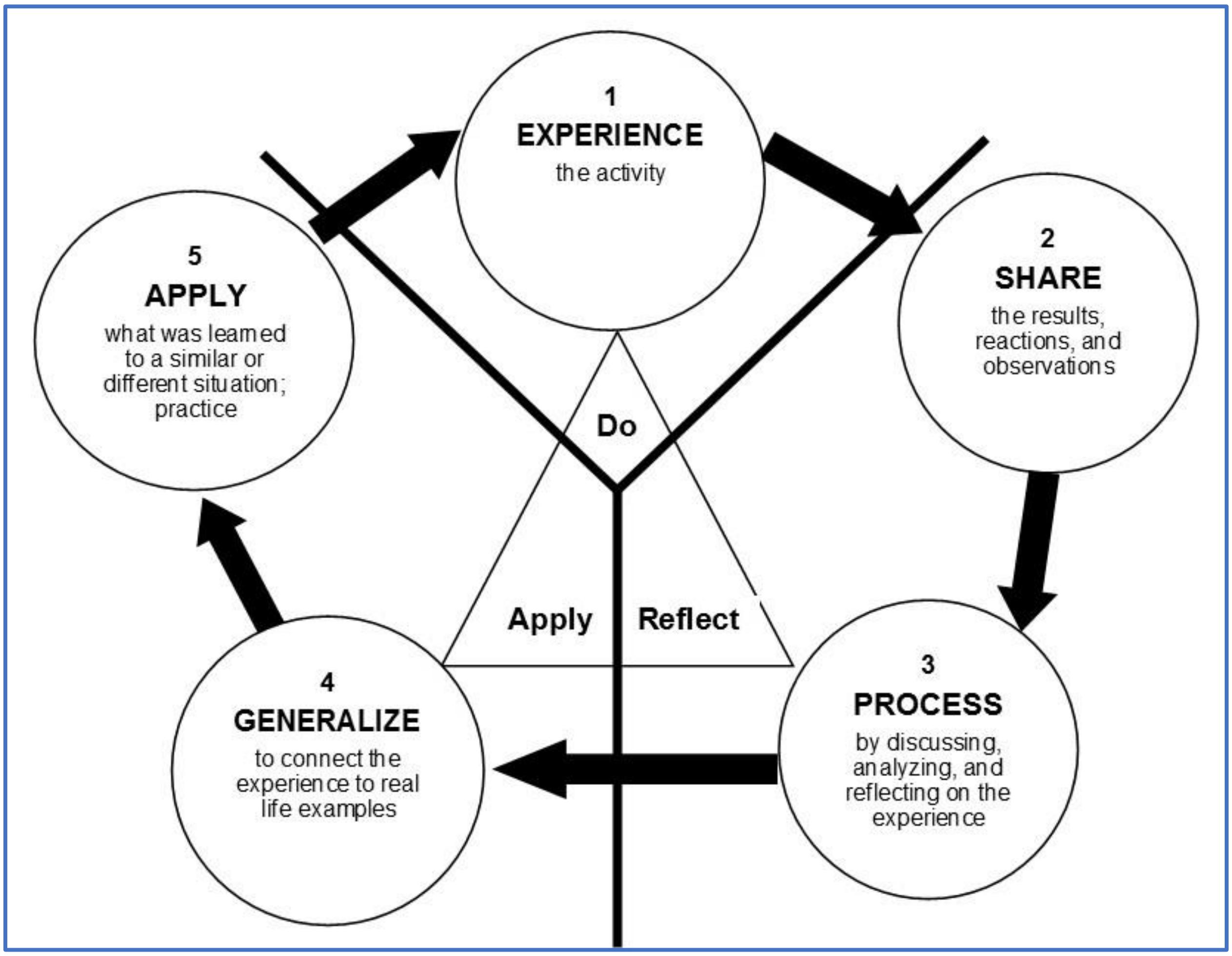
[3] Alice Kolb and David Kolb, "Eight Important Things to Know about The Experiential Learning Cycle," Australian

[4] See, for example, Ruth Heyler, "Learning through Reflection: The Critical Role of Reflection in Work-based Learning," *Journal of Work-Applied Management,* Vol. 7, No. 1, pp 15-27, October 6, 2015. See https://www.emerald.com/insight/content/doi/10.1108/JWAM-10-2015-003/full/html.

[5] Training Wheels, "The Experiential Learning Cycle," Tips for Trainers, posted March 14, 2018. Based on the work of David Kolb. See https://training-wheels.com/the-experiential-cycle/.

Activities in the *Training Guide* are designed using the experiential learning model, and allow time for participants to experience an activity individually or in a small group, report on and discuss their experience, and consider how they can use new knowledge and skills. The trainer/facilitator provides information (often in a brief "lecturette" using PowerPoint slides from the *Training Guide*), either before or after an experiential activity, facilitates the sharing and processing, and helps participants generalize the training experience so it helps in their work as PC/PB or committee members.

The Experiential Learning Cycle



IV. Sound Practices for PC/PB Training

A. Implementing Experiential Training

Like other training for adults, PC/PB training needs to be experiential to maximize impact. PC/PB training is designed to prepare potential or new members of the PC/PB or its committees to carry out their HIV community planning roles, which means the focus is on applying new knowledge and skills. The information provided here offers practical suggestions for making training interesting and effective. If training and facilitation are not your primary role, these approaches can make training easier and more comfortable. Some of them involve planning, but most relate to ways to carry out the training. You may find it helpful to review each of these sound practices and identify several to use the next time you do orientation or other training.

B. Sound Practices

The following approaches apply adult learning theory in practical terms and suggest ways to make PC/PB-related training sessions both interesting and effective.

1. **Assess member needs as you plan the training.** This ensures that you understand the range of knowledge, skills, and experience among the group. 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 assessment survey for participants to complete in writing or online several weeks before the training. List topics you expect to include and ask members to indicate their level of need for training in each topic, perhaps using a four-point scale (e.g., None = 1, A little = 2, Moderate = 3, Great = 4). This type of scale is helpful because it asks them to think about both their current level of knowledge or skills and the importance of the topic in helping them carry out their PC/PB responsibilities. Use the results in planning your training. (The box on the next page provides a sample, created for online use.)

2. **Use a diverse team rather than one individual to plan and provide training.** In PC/PB training, staff often do orientation or training with a PC/PB or committee Chair or Co-Chair, someone from the Membership Committee, a recipient representative, and/or an outside consultant. Use of a team not only shares the work but also provides diverse input into training content. The ideal team is multicultural and includes at least one member with each of the following: strong adult training experience, in-depth understanding of the topic areas, and strong practical experience in applying the stated skills or knowledge in a community planning setting.

PC/PB Training Needs Assessment

The Planning Council will hold its annual one-day training session and retreat March 21 from 10 am to 4 pm. Please help us plan by telling us your training needs and suggestions. You can complete the survey in less than 5 minutes.

1. Please tell us your level of need for training in each of the following topics.

	None	A little	Moderate	Great	Don't Know/Not Sure
a. Roles and responsibilities of PC members	○	○	○	○	○
b. PC-recipient relationship and boundaries	○	○	○	○	○
c. Understanding and using client characteristics and service utilization data	○	○	○	○	○
d. Managing Conflict of Interest during PSRA	○	○	○	○	○
e. Inclusive planning	○	○	○	○	○
h. Restructuring and strengthening committees	○	○	○	○	○
i. Bylaws changes to strengthen the consumer voice	○	○	○	○	○

2. What one thing do you most want the PC to accomplish at the training retreat?

3. Please provide any other desired input to help in planning the training retreat.

4. How long have you served on the PC?

- ○ Less than 1 year
- ○ 1-3 years
- ○ 4-6 years
- ○ More than 6 years
- ○ N/A - not a PC member

3. **Use active training methods that maximize retention.** Understanding that adults learn best when they are actively involved in the learning process, use a variety of active learning approaches. When knowledge and skill levels of participants are quite varied, use of small groups is particularly effective in helping them learn from each other. Design your training sessions to minimize the use of passive methods like formal presentations and

lectures that last more than 15-20 minutes, and maximize the use of active learning methods like worksheets, scenarios, and role plays. Lecture methods tend to be ineffective with a diverse participant group. If you provide information appropriate for those who have the least experience, those with more experience are likely to be bored. Small groups allow you to group participants according to experience level or use mixed groups so participants can teach, learn from, and help each other.

4. **Think of the people you train as *participants,* not as an *audience.*** Audiences can be passive watchers and listeners; participants are actively involved in the training process.

5. **Provide varied learning opportunities and approaches to fit different learning styles.** For example:

   - **Use both individual and small-group activities,** or use pairs as well as groups of 4-6.
   - **Appeal to many senses and use multi-media approaches.** Be sure people can *see* summaries of major points by putting them on PowerPoints or writing on easel pad paper. Describe major points and provide examples for participants to *hear*; use a video for multi-media effects where feasible. Have small groups prepare easel pad summaries as they work. This helps groups focus their efforts, makes reporting to the full group more efficient and organized, and improves retention.
   - **Use both cooperative and competitive approaches.** Some people learn well by 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 5-6 people.
   - **Use both inductive and deductive** methods (building a model or learning a rule based on examples or steps versus starting with the whole model or concept and breaking it down into components). Each approach works best for some people. Deductive methods often put more responsibility on the trainer, to present a model or concept and then have participants practice it. Inductive learning – sometimes called "discovery learning" – asks participants to look at examples and use them to build understanding of the model or concept. Both approaches are useful in training.
   - **Recognize that participants usually include both "big picture" and "detail-oriented" people.** Big picture people are often creative and visionary strategic thinkers but can be disorganized and impatient about laying out and following a series of steps to complete a task. Detail-oriented people are well organized and good at step-by-step efforts, but sometimes have trouble seeing the larger purpose. A PC/PB benefits from both types of thinkers, provided they understand the benefits of both approaches. As a trainer, you can help participants recognize their own preferences, learn to appreciate the other approach, and learn some of the skills that come less naturally. For example, integrated/comprehensive planning benefits from big-picture thinking about goals that will help in ending the HIV epidemic, but also requires a work plan that lays out the steps and the methods for overcoming barriers to reaching those goals. To increase

awareness of these complementary approaches, you might assign tasks to pairs that include two big-picture thinkers, two detail-oriented thinkers, or one of each, and then explore how these different pairings affected their work.

6. **Make small groups a central part of your training.** Small groups play a huge role in effective experiential training, for many reasons. In a large group, only one person can speak or present at a time, but divide participants into four small groups, and they have four times the opportunity to share their ideas. Small groups encourage participation, particularly when they are small enough that everyone is needed to complete assigned tasks. Many people who are silent in a group of 20 are comfortable speaking and taking leadership of a small group of 4-6. Newer members who defer to veteran PC/PB members in a large group may speak out in a small group – and you can assign group members so they are either diverse or similar in level of experience or other factors. Following are some strategies for using small groups to maximize participation and learning.

   - **Provide specific tasks and instructions.** Whenever possible, give instructions both orally and in writing—as an assigned task with a desired outcome, a scenario to analyze, a worksheet to complete, or questions to answer. Provide a list of steps or activities to be completed by the small group. *Training Guide* activities all include trainer instructions and handouts for the small groups.
   - **Ask members to take specific roles within the small group.** At a minimum, be sure someone serves as the facilitator to coordinate the work of the group and also participate, someone to take notes, and someone to present the work of the small group to the full group. Having roles helps the group get organized quickly.
   - **Provide clear time limits for group activities—and allow at least as much time for reporting and discussion as for the small-group work.** Time limits help the group focus on the task and stay focused. Give a little extra time where necessary and feasible, but keep to reasonable limits. Allow plenty of time for small groups to report back and for the full group to discuss their work and recommendations.
   - **Watch groups—and if you see problems, offer help.** Someone needs to be available to as a resource person or problem solver. Usually this is the trainer(s). Visit each small group several times while members are doing an assigned activity. If someone is dominating the group, support the small group facilitator by asking people to speak in turn or wait to be recognized. If the group gets "stuck," provide more explanation of the assigned task or ask questions that help members focus and begin to make progress.
   - **Encourage full participation by asking members to "think, write, then share."** At the beginning of the group work, if you plan to brainstorm and issue or plan an activity, allow 2-3 minutes for each member to think and make notes individually about the questions or tasks. This helps everyone be well organized before speaking. It also reduces domination by individuals who are particularly verbal. Some people are more assertive and tend to speak very easily, while others need time to organize their thoughts.

- **Be sure your room arrangement and materials support small-group work.** Small groups usually work best when they can sit around small tables so everyone is facing each other and has a place to put materials and write. If this is not possible, put chairs in a circle. Groups need to be far enough apart to minimize noise distraction. If they are brainstorming or planning, groups need several pieces of easel pad paper and a marker so they can write down ideas and refer to them as they work. This helps keep them focused. Make the environment comfortable by having water and where possible coffee, tea, and/or soft drinks readily available in the work area.

7. **Use "cooperative learning" methods.** These techniques recognize that a learning activity includes both *content* (the information or skills being taught) and *structure* (how the content is presented). Many adults and young people learn better in cooperative groups than in individual competitive situations, and cooperative learning is superior for problem solving. Cooperative learning is interactive and experiential, and it fits the "real world" of PC/PBs and their committees, which do most of their work in groups rather than individually. A small group can become a cooperative learning group with the right guidance from the trainer.

   Cooperative learning is based on **"**simultaneous interaction" by small groups all working at the same time, "positive interdependence" among participants within each group, individual accountability, and equal participation. As applied to adult learning, cooperative learning uses small groups or teams of about four to six members. Because all the different groups are working at once, the level of individual participation is much greater than would occur in a single large group – which greatly increases learning and knowledge retention. One of the most impressive aspects of cooperative learning is that participants take responsibility for helping to create a positive environment and working with the trainer. Cooperative learning lets the trainer spend time as an observer and consultant, moving from group to group, providing content input, answering questions that small group members are unable to answer among themselves, but not keeping order. The trainer may provide lecturettes and guide the group, but encourages participants to learn from each other.

   Cooperative learning uses a number of approaches and steps designed to ensure full participation of all training participants (called team members).

Cooperative Learning Roles

- **Facilitator** – responsible for organizing the work of the group, and being sure it stays on task and everyone participates.
- **Recorder** – takes notes, writes on newsprint as the team brainstorms, or prepares the newsprint to be used to summarize the work of the team.
- **Reporter** – shares with other teams the work or conclusions of the team.
- **Timekeeper** – monitors time available for the tasks.
- **Observer** – watches the group process and describes it to the full group.

Several of these approaches, listed below, can be particularly helpful in PC/PB training. A major advantage of cooperative learning is its focus on 100% participation. Given the superiority of active learning, this means more learning and retention of information and skills and a learning environment that is comfortable for all participants.

- **Role Assignment:** As noted above, small groups work best when members have assigned roles. Cooperative learning roles are shown in the box. Ideally, every small group has a facilitator, recorder, and reporter, though sometimes the same person serves as both recorder and reporter. When groups are large or tasks involve multiple steps, it is helpful to have a timekeeper.

  Where part of the training is intended to improve group process *(*for example, training related to *Training Guide Module, Working Together: Effective PC/PB and Committee Meetings)*, having an observer can enhance discussion and learning by providing an additional perspective. Over time, everyone should take every role. In staff or leader training, a frequent rule is that the most senior person in the group is never the reporter, since speaking for the group is a role the senior person very often plays. If someone tends to dominate the group, make that person the observer!
- **Think Time:** Individuals vary a lot in how they think about a topic and prepare to share their ideas. A trainer can use “think time” by posing a question and asking everyone to spend anywhere from 30 seconds to 2-3 minutes considering their response before beginning the discussion. This helps every participant be prepared to speak, not just those who are the most verbal or assertive. “Think time” usually leads to clearer, better organized responses. In groups where some participants are quieter than others, or if English is a second language for some of them, “think time” may increase their active involvement.
- **Discussion in Pairs:** Instead of using only small groups of 4-6 or individual activities, you can also ask participants to think for a minute or two individually about a topic, then discuss their ideas with one other person before full-group discussion begins. Sharing with one other person is much less intimidating than sharing in a full group. Use this step where participants don’t know each other well or are shy about speaking up. For example, this may be particularly helpful in new member orientation.
- **Round Robin:** When a group is brainstorming, try asking each participant to present one idea, going around the room, with no comments. This is useful for getting a lot of ideas "on the table" for later discussion. A participant can also say "no comment" and "pass."

Many of the concepts of cooperative learning are familiar to most facilitator/trainers, even if they don't use the same terminology. Some are less obvious. In practice, cooperative learning may not seem terribly different from other interactive, experiential approaches. However, it is a well-developed approach, and its techniques can increase participation and facilitate team building. It is particularly appropriate for multicultural and/or heterogeneous groups.[6]

8. **Be systematic in helping participants learn or strengthen skills they will need to meet their PC/PB responsibilities.** This may include both group-process skills like chairing a committee or full PC/PB meeting and content-focused skills like reviewing and assessing data from various sources. 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 learning model. Almost any skill can be presented by following these steps. For example, perhaps you want to teach members of the Needs Assessment and Planning Committee – most of them newly appointed to the committee – how to do needs assessment that meets legislative requirements and HRSA/HAB expectations. Your training could be based on materials in *Training Guide Module 4, Needs Assessment*, and use the following steps:

   a. **Introduce the skill *to* be learned**. You might begin by explaining the legislative requirements for needs assessment; discussing why needs assessments are important in providing data for decisions about priorities, allocations, and directives; and listing the components of a RWHAP Part A needs assessment.

   b. **Show the whole skill.** Show what a completed RWHAP Part A needs assessment looks like, in terms of both content and formats for presenting results. Do this by sharing either your PC/PB's most recent needs assessment plan and report or a model you like from another PC/PB. Use a PowerPoint or handouts to show the needs assessment plan and the executive summary, table of contents, and key findings or summary presentation from the needs assessment report.

   c. **Show and tell.** Present various segments of the skill. Ideally working with a veteran PC/PB member, perhaps the committee chair, describe the steps in needs assessment planning, design, implementation, and reporting:

      - For *planning:* determine the scope of this year's needs assessment (perhaps referring to a multi-year needs assessment plan that includes all the recommended

Steps in Teaching a Skill

a. Introduce the skill
b. Show the whole skill
c. Show and tell the various segments of the skill
d. Check the group's understanding
e. Provide practice
f. Emphasize the practical importance of the skill
g. Provide an opportunity to use or apply the whole skill
h. Conclude and summarize

[6] For more information on cooperative learning, see L. Lin, "Exploring Cooperative Learning: Theoretical and Conceptual Perspectives," Chapter 2 of *Using Collaborative Learning to Enhance Learning,* 2015. Available at: https://pdfs.semanticscholar.org/58c6/798b9afabb6bb1e7df1259123e94425e4d05.pdf.

components of a comprehensive RWHAP Part A needs assessment using a three-year cycle), including major needs assessment activities (e.g., consumer survey, assessment of unmet need, profile of provider capacity and capability, focus groups of key target populations), determine the overall timetable and budget, agree on responsibilities for conducting and overseeing the needs assessment, and establish a process for broad community input.

- For *design:* determine data needs, design the data collection instruments (often with the help of staff or consultants), determine how information will be analyzed, and agree on what the report will look like (e.g., tables, PowerPoint, summary matrix of findings, narrative report).
- For *implementation*: collect primary (new) data (e.g., through individual interviews or surveys of people living with HIV [PLWH], focus groups, town hall meetings, key informant interviews), review epidemiologic data, obtain other secondary (existing) data.
- For *analysis and presentation*: analyze the information; organize and report results, using agreed-upon, user-friendly formats; and present the data to the responsible committee and then to the full PC/PB, perhaps as part of an annual data presentation that begins the PSRA process.

d. **Check the group's understanding.** Ask questions for the group to answer so you are sure you have been successful in your presentation: You might use some of the scenarios in the *Training Guide [*such as *Module 4, Needs Assessment Mini-Activities 4.1, 4.2, and 4.3].* Or you could ask questions like these:

- What information should be included in a multi-year needs assessment plan?
- What are some methods that might be used to get input from PLWH who are not in care?
- What formats help make data understandable and useful for decision making?

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 PLWH who are immigrants and refugees, homeless, or recently incarcerated.

e. **Provide for practice.** Have small groups prepare and present plans for conducting different components of a needs assessment (e.g., a PLWH survey, an assessment of PLWH who are or were recently out of care, a provider inventory, or a survey of provider capacity and capability), perhaps using a *Training Guide* activity *[such as Module 4, Activity 4.4: Outlining a Needs Assessment Work Plan]*. Then have them present their plans to the full group and critique each other. Ask them to identify roles members need to play in ensuring that the needs assessment targets and reaches different PLWH subpopulations, including groups within the community. As trainer, answer questions, provide hints, and help participants link the various components of the needs assessment.

f. **Emphasize the practical importance of the skill.** Discuss why needs assessment is so important to the PC/PB in its decision making. Have the group consider what might happen if the PC/PB did not have adequate needs assessment data in some typical situations, like deciding whether to change the priority ranking of services like outpatient substance abuse treatment, or developing a directive to improve retention of young African American MSM, who have low rates of viral suppression according to HIV care continuum data.

g. **Provide an opportunity to use/apply the whole skill.** For example, have small groups outline a plan for a multi-year needs assessment, with reference to a *Training Guide* handout *[Quick Reference Handout 4.2, Multi-Year Needs Assessment Plan]*. If the group is about to conduct a needs assessment, provide the training as a way to begin the planning process. This can help prepare the group to participate actively and knowledgably in the needs assessment process.

h. **Conclude and summarize.** Provide hints and re-emphasize the main points, and if a needs assessment is planned, have the committee chair talk about how participants will be expected to participate in the needs assessment process.

9. **Plan training in detail, then modify your plan as necessary.** The better your planning, the better prepared you will be to make adjustments. For any session of 1½ hours or more, develop a detailed agenda, with objectives, at least one experiential activity, PowerPoint slides or a summary handout, reference materials, and either questions for an oral evaluation or an evaluation form to get feedback on what people learned and how they felt about the training. For a shorter session, you may not have time for a full-scale activity, but should still have an agenda and PowerPoint slides or a summary handout, as well as a quick scenario or discussion questions. If you are using several facilitator/trainers, prepare together and be clear on roles. Be prepared to make adjustments during the session, especially for a session lasting half a day or more. You might need to spend more time on some topics and less on others, revise group activities, manage interactions, and/or allow time for in-depth discussion on an issue of special concern to the group.

10. **Develop a personal training style that engages participants and builds mutual respect and trust.** Consider the following:

- **Demonstrate cultural competence and humility.**[7] Race/ethnicity, nationality, native language, age, gender identity, sexual orientation, and/or level of education are among the factors that influence learning styles and group behavior. As a trainer, you want to make everyone to feel comfortable and valued, and help the group maintain a supportive and respectful environment.

- **Involve participants in lecturettes or presentations,** so they become discussions. Consciously practice effective ways of asking questions and encouraging different individuals to answer. Make eye contact. Vary the pace of your presentation. Ask

[7] For definitions and discussion of these concepts in a PC/PB context, see Training Guide Module 9, PowerPoint Slides 9.4: Inclusive Planning, and Trainer Notes, Key Concepts and Terms.

participants to think for a minute before beginning full-group discussion, so quieter members have time to gather their thoughts.

- **Reveal things about yourself,** including past experiences or lessons from other training sessions. If you ask participants to share something about themselves as an ice-breaker or team-building activity, include yourself in the sharing. Don't make yourself the focus, but do make yourself accessible.
- **Look and be interesting.** Project energy, movement, and enthusiasm. Look at the participants while you are talking. Be prepared, so you don't read PowerPoint slides or need detailed notes.
- **Project self-confidence – but not arrogance.** If you seem confident and well prepared, participants will assume that you have a lot to offer. Also show that you are open to learning from participants as well as teaching them.
- **Show interest in participants and their needs.** Focus on what participants say, and try to address their stated needs and concerns. If a participant has a question or concern relevant to the work of the PC/PB that cannot be addressed during the training, put it in a parking lot or make a note, and be sure someone follow up.

11. **Require respect for the experience and contributions of all participants.** *All* members of the training team should respect and value the varied knowledge and experience of all PC/PB and committee members. *No one* should assume or communicate a belief that formal education is more important than practical knowledge and experience, or that anyone is more important to the PC/PB based on level of formal education and training or job status. Agree on ground rules that include respectful interaction.

12. **Prepare outside presenters 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 on a small-group or other experiential activity to use along with a lecture or panel presentation or develop it yourself. For any lecture or panel, allow time for questions. This may mean being very strict about time allocated for the lecture portion of the presentation.

13. **Use consultants carefully.** If you hire an external consultant to conduct the training, be clear on what you want and be sure of a good "fit" between your PC/PB's needs and the consultant's philosophy and skills. Be sure the consultant understands the characteristics and level of experience of expected participants. Before seeking a consultant, decide on the focus of your training and prepare a scope of work describing the consultant's role in training design and delivery. Include requirements for preparation of a written agenda, objectives, PowerPoint slides, training activities, reference materials, and/or a participant evaluation form. Allow time for PC/PB staff and leaders to review consultant materials and identify revisions, if needed. When considering a training consultant to develop and provide orientation or training of substantial length or complexity, have both PC/PB support staff

and a PC/PB member talk to candidates in person or by telephone and ask pre-determined questions (See sample questions in the box).

Sample Questions for Interviewing a Training Consultant

1. Tell us about your training philosophy and style.
2. How familiar are you with the Ryan White HIV/AIDS Program (RWHAP), especially Part A and its requirements for a Planning Council/Planning Body?
3. Tell us about your prior experience with training related to the RWHAP? Part A Planning Councils/Planning Bodies or other health planning bodies? What about training community members or consumers of services? Working with diverse participants?
4. How would you suggest working with a committee to prepare for the training (*e.g.,* meet with us as a group, provide draft materials for review)? What about involving 1-2 PC/PB leaders as co-trainers? *[Refine this to reflect how you would like your consultant to work with you.]*
5. Would you be comfortable developing training based on information provided in the *PC/PB Training Guide?* Preparing a detailed agenda and materials that we can continue to use in future years, whether or not you serve as the trainer?
6. Are you familiar with the Experiential Learning Cycle? What kinds of experiential activities do you use most often? How do you use small groups?
7. What do you do to keep training participants alert and involved?
8. We have a PowerPoint projector. What other audio-visual equipment do you like to use?
9. How do you assess how well a training session is going? If you identify problems, how do you address them?
10. Suppose you were training PC/PB members and it became clear that there were some problems within the group and participants were not working well together. How would you handle the situation?
11. Can you provide some references from groups you have trained? May we see some sample training materials?

V. Developing Training Materials and "Packages"

A. Components of a Training Package

This section is designed to help you become comfortable developing your own training packages. While it uses examples from the *Training Guide*, the components of an experiential training package are much the same, regardless of the content of the training.

A fully developed orientation or training package should include the following six components:

1. **A list of training objectives** that state desired knowledge or skills participants will have by the end of the training, in measurable terms. The same rules apply for training objectives as for program objectives: use "to" plus an action verb and an object.
2. **A training agenda,** time-phased, specifying topics and subtopics, and including specific starting and ending times, lunch and shorter breaks. While you may provide food and plan for a working lunch, you need to provide at least a 20-30 minute lunch break, plus a shorter break about every two hours. A typical 6-hour orientation or training session will include a 10-15 minute morning break, a 45-minute lunch break, and a 10-15 minute afternoon break.
3. **A PowerPoint – or some other outline or summary –** to help present training "content. Pre-prepared easel pad sheets or a handout can be used instead. PowerPoints help trainers present information in logical order, with a good flow.
4. **Experiential activities or "exercises"** that provide for active learning, including self-assessments, work sheets, case studies, scenarios, role plays, games, and other active-learning tools. Activities should include a handout with a statement of purpose and specific instructions. Each topic in the *Training Guide* includes at least one experiential activity with detailed instructions and sometimes a related handout. Many also include quick scenarios or discussion questions labeled as "mini-activities" that can be used during PowerPoint "lecturettes" and full-group discussions, so members can test and apply new knowledge and skills.
5. **Handouts/reference materials** for ongoing use. These might include printouts of the PowerPoint presentation if you use one, and a quick reference handout that summarizes main points from the training.
6. **A post-session evaluation** that is usually, but not necessarily, a written form. The evaluation should assess the extent to which participants report learning new skills and knowledge related to session objectives, training quality and trainer skills, satisfaction with various aspects of the training, and what they expect to do differently because of the training.

Written forms are easy to use, but if there are concerns about English fluency or literacy, an oral discussion or other non-written approach may be more appropriate.

Developing a full training package supports participant learning, gives members materials for ongoing reference, and makes it easy to repeat the training, with minor updates, in the future. For mini-training sessions, perhaps as a 20-minute segment of a PC/PB or committee meeting, you may not need a full training package. However, training tends to be more effective if the trainer has thought carefully about training topics, objectives, and the information to be shared – and these can be provided in a brief PowerPoint presentation or written summary.

Following are some step-by-step suggestions for preparing training packages. Since every PC/PB provides new member orientation, the primary example used is a 4-hour basic orientation for newly elected PC/PB members. If your PC/PB has alternates who participate in meetings and vote on behalf of absent PC/PB members, they should receive the same orientation.

The sections below provide ideas for developing each component of a training package, and making use of *Training Guide* materials to do it. The information in *italics* indicates where in the *Training Guide* relevant information is found.

B. Developing Each Component of a Training Package

1. Training Objectives

- **State your training goal or purpose first,** since it guides development of objectives and the rest of your training design. For orientation, your goal may be to ensure that all new PC/PB members have a basic understanding of the structure and roles of a RWHAP Part A PC/PB and their responsibilities as member.
- **Now develop training objectives, which are a form of "learning objectives."** They describe where you want the participants to be at the end of training, in terms of what they should know (knowledge) and be able to do (skills). Sometimes you may also want to know how they feel about an issue or topic (attitudes). *If you are using Training Guide materials, look for the objectives in two places:*
  - *At the beginning of the PowerPoint for every module or major module topic; and*
  - *Near the beginning of the Trainer Notes for each module.*
- **Like other program objectives, training objectives should *state a result in measurable terms, with a time deadline.*** Usually the time specified is the end of training. A good format is *to* plus *an action verb* with an *object* and *modifiers* which specify criteria to be used in determining whether the objective has been met. *For example:*
  At the end of new member orientation training, participants will be able:
  - To list and describe the three major legislative responsibilities of planning councils.
  - To specify what major legislative duties are carried out solely by the planning council, with no recipient involvement, and which major duties are carried out solely

by the recipient, with no planning council involvement.
   - To describe the characteristics of an “unaligned consumer” of RWHAP Part A services.

- **State objectives in logical learning order;** this usually means that they are in the chronological order of presentation.

2. Training Agenda

- **Prepare an agenda with topics, activities, and timelines,** whether you make it a handout or put it in your PowerPoint presentation. It ensures that you have a clear plan for the training and are able to complete all necessary topics and segments.
- **Base your agenda on an adult learning model** that focuses on active learning. Make the agenda detailed and specific enough to:
  - Enable possible participants to decide whether they will benefit from the training
  - Guide the trainers in planning and implementing the session
- **Include precise timing,** which means starting and ending times for:
  - The overall training session
  - Training topics or segments
  - Breaks
- **List trainers/facilitators with** titles and affiliations. This is especially helpful for outside trainers or presenters, both as a courtesy to them and so participants can locate them in the future.
- **Specify major topics;** for each topic include subtopics and major points to be covered. Also list each activity and briefly indicate the type of activity (e.g., scenario, role play). If there are several activities, give them numbers or letters (Activity A, Activity B), and then label the activity handouts the same way. Remember that the overall agenda needs a **beginning** (introduction), a **middle** (knowledge and skill development topics), and an **end** (sum-up, questions and answers, assessment). If you do a multi-day training, start each new day with a brief introduction and end each unit with a sum-up that pulls concepts together.
- **Provide adequate time for all segments,** but keep the schedule "tight" enough to be fast-paced and keep participants engaged. Beware of segments under 30 minutes. Too many short segments make the training "choppy," and skills cannot be taught that quickly, without time for an experiential activity. Even knowledge segments usually take at least 30 minutes.
- **Try to limit presentations/lecturettes that do not actively involve participants to 20 minutes.** You can increase this considerably if you break up the presentation with quick scenarios or group discussions and actively involve the group in the lecturette by asking quick questions *[Most Training Guide modules have Quick Mini-Activities, single PowerPoint slides that can be used as part of an interactive presentation to check knowledge and keep participants engaged]*.

- **Provide good transition between segments** – show how they interrelate and how one segment provides the foundation for the next. If segments don't seem to "flow," consider reordering them.
- **Vary the pacing of training.** For example, begin some topics with a lecturette and others with an activity. Avoid getting into a predictable cycle that goes from lecturette to exercise, then discussion, then summary. Use different types of activities in small groups. Include activities that are also fun, like role plays, or competitive, like knowledge games.
- **Remember the "human clock";** have active segments right after lunch and in late afternoon. Surprises or light segments are especially welcome during "low-energy" periods. Schedule a break about every two hours. Even a quick "stretch break" is helpful, but 10-15 minutes is better. Having breaks renews energy and makes it easier to enforce no-cell-phone rules.
- **Build in excess time at the beginning of the training if people are likely to arrive late** (which is almost universal), so you avoid running late before you get started. Also leave a little slack at the end of the session.

The box on the next page provides a sample training agenda for a basic PC/PB new member orientation lasting about half a day.

3. PowerPoint (or Other Content Outline)

- **Use a PowerPoint presentation to summarize the main points of your training,** whether that means 4-5 slides for a mini-training session or 80 slides for a full-day orientation or retreat. The presentation helps guide your training and improves coordination and flow, especially if there are multiple trainers or presenters. Preparing the PowerPoint requires you to think about important aspects of the training – objectives, topics, flow, main points, ways to practice or apply new knowledge or skills.
- **Prepare some other type of "content outline" or summary if you don't want to use a PowerPoint.** Prepared easel pad sheets are an alternative – but be sure the writing is clear and large enough to be visible at the back of the room, and written with a very dark, high-contrast marker. You can also outline key content on paper and pass it out as a handout. However, avoid providing a reference handout with a lot of text, because participants are likely to start reading it instead of concentrating on your presentation, which reduces their engagement and retention.
- **Use the PowerPoint as a way to get participants to use both their eyes and ears during training.** Research indicates that adults may learn new skills better through multi-sensory training – e.g., both vision and hearing. One study found that "People generally

Sample Planning Council Orientation Agenda
1:00 – 5:00 pm

1:00 – 1:30 pm	**Pre-Orientation Get-Acquainted Session**
1:30 – 1:45 pm	**Welcome and Introductions** • Welcome • Participant Introductions and Expectations
1:45 – 2:30 pm	**The Ryan White HIV/AIDS Program (RWHAP): What Every Planning Council Member Should Know** • Pre-test: Who Does What and Why? *[Training Guide Module 2, Activity 2.2]* • Overview of the RWHAP • RWHAP Part A
2:30 – 2:45 pm	**Break**
2:45 – 3:45 pm	**Overview of Planning Council Roles, Responsibilities, and Boundaries** • Roles Matrix and Quick Feedback: Participant Familiarity with PC Duties • Planning Council Duties, Recipient Duties, and Shared Roles • Boundaries • Checking Knowledge: Review of Roles and Responsibilities Matrix *[Training Guide Module 2, Activity 2.4]*
3:45 – 4:45 pm	**Planning Council Operations** • Participant Brainstorm on PC Operations (Activity 3) • Scope of PC Operations • PC Support Roles • Recipient Roles • Committee Structure • Expectations for PC Members
4:45 – 5:00 pm	**Sum Up and Evaluation** • Update of Quiz Responses (from Activity 1) • Sum Up • Session Assessment
5:00 pm	**Session Ends**

remember 10% of what they read, 20% of what they hear, 30% of what they see, and 50% of what they see and hear."[8]

- **Always provide your PowerPoint as a handout.** If the slides are mostly text, copying them three to a page, with lines for notes, works well. If you use charts or other graphics, you may need to copy them two per page for readability.

[8] D.G. Treichler, as quoted in Ladan Shams and Aaron R. Seitz, "Benefits of Multisensory Learning," *Trends in Cognitive Sciences,* Vol. 12(11), 411-17, November 2008. See https://faculty.ucr.edu/~aseitz/pubs/Shams_Seitz08.pdf.

- **For short training, just use a title slide and a few content slides.** You can explain the use and development of directives as part of the PSRA process in about ten slides, and explain the planning council's role in coordination of services in six.
- **For a training session or retreat that lasts longer, use the PowerPoint to guide the order and flow of the entire session,** including topics and training objectives and breaking up content slides for your "lecturettes" and presentations with topic subheads and quick scenarios or discussion questions. End each topic section with a summary slide.
- **Consider the following when preparing your PowerPoint:**
  - **Don't put too much information on a slide.** Include key points and phrases, usually in bullets, not full sentences. You don't want participants reading it instead of listening to you.
  - **Use easy-to-read fonts.** PowerPoints that are projected should generally use simple, easy-to-read fonts that are sans-serif (without lines at the bottom of the letters) like Calibri or Arial, rather than serif fonts like Times New Roman or Cambria. Black, strong fonts are most visible from a distance. Avoid "light" fonts – use Calibri (body) rather than Calibri (light). Put headers and major points in **bold.**
  - Maximize contrast. Black or dark blue type on a white background will be much more visible than red type. Avoid colored background styles that reduce contrast, like green or gray.
  - **Use large type.** Text for main bullets should be at least 24-point type, ideally larger, and secondary bullets not less than 22-point type. Use a larger type for the heading.
  - **Use attractive visuals along with text where possible.** Pictures or other illustrations make slides more attractive. Graphics or charts can be very helpful, if they are clear, easy to see, and appropriately explained.
- **Do not read the PowerPoint.** Think of it as an outline of key points for participants, and a reminder for the trainer of order and flow. Discuss the content and provide examples to keep participants engaged.
- **Provide a copy of the PowerPoint to participants prior to training**. Unless there are lots of data or charts, consider using the format with three slides per page and space for notes. This approach supports learning because participants will use multiple senses – they can hear, see, and take notes on the training. Unless you are copying the PowerPoint in color, run a test copy to be sure everything is readable in black, white, and gray.

4. Experiential Activities

- **Active learning is essential for training adults,** especially groups like PC/PB or committee members. RWHAP is a complicated program, and they need a mix of knowledge and skills to fulfill their roles. Use a variety of experiential activities, such as the following (The *Training Guide* includes examples of most of them):
  - **Quizzes,** sometimes both pre- and post-session, so participants can assess their knowledge and what they learned. Quizzes are usually done individually, but can also be an assignment for small group. Examples in the *Training Guide* focus on

identifying various RWHAP "Parts" *[Module 1, Activity 1.2: What's My Part? Quiz],* PC/PB roles and responsibilities *[Module 2, Activity 2.2: Pre- and Post-Training Quiz: Who Does What and Why?],* and data terminology *[Module 10, Activity 10.1: Data Terms and Concepts Quiz]*.

- **Brainstorming** in which participants quickly identify issues, problems, or approaches. Brainstorming is quick and easy, and can be used in a full group or small groups. It works best when you go around the group and each participant (or the reporter for each small group) provides just one idea, so everyone gets to add something. Just keep going until everyone "passes" because they have no more suggestions. The *Training Guide* recommends use of brainstorming around important things to know about HIV community planning *[Module 2, Activity 2.1: Pre- and Post-Discussion Questions about RWHAP Part A Community Planning]* and cultural issues to consider when managing discussion and conflicts *[Module 9, PowerPoint 9.4, slide 17,* and *Quick Reference Handout 9.6, Ten Strategies for Inclusive HIV Community Planning, Strategy 4].*
- **Case studies or scenarios** (mini-case studies) that describe a situation or problem, then pose a problem to be solved or questions to be answered. The situations should reflect situations participants are likely to encounter. If you use real events, it is usually best to change details, so that organizations and individuals are not identifiable. Scenarios can be very quick to use, and the *Training Guide* uses many of them as single slides. For example, many of the modules have Mini-Activities *[See Module 4, Activities 4.1, 4.2, and 4.3]* or Quick Scenarios to Apply Knowledge *[See Module 5, Activity 5.1; Module 8, Activity 8.1; and Module 10, Activity 10.7],* or Quick Activities to Support Learning *[See Module 6, Activity 6.1].*
- **Materials to be reviewed or critiqued,** such as a sample data report to assess for quality and usefulness, typically with points to look for or questions to be answered *[See Module 10, Activity 10.5: Using Triangulation].*
- **Tasks with worksheets,** like development of a committee or task-specific work plan *[See Module 4, Activity 4.4: Outlining a Needs Assessment Work Plan],* or committee work plan or a plan to address an issue like health disparities in HIV *[See Module 2, Activity 2.5: Worksheet on Key Aspects of HIV Community Planning]*.
- **Skill practice sessions** (individual or small group), like a mock priority-setting or resource reallocation process, using either the EMA's or TGA's own data or made-up data *[See Module 5, Activities, 5.2, 5.3, 5.4, and 5.5].*
- **Games,** such as Bingo or trivia contests that use questions and answers about a topic like legislative responsibilities of a PC/PB or your PC/PB's committee structure or policies and procedures. PC/PB leaders can help develop a local game to use in orientation for new members. Games can make the learning process fun and encourage friendly competition among participants or small groups.
- **Role plays,** sometimes involving all participants in preparing one of the roles or using a "fish bowl" approach where other participants help to plan how a role will be played and then observe the role play from various perspectives. The *Training Guide* includes a role play on involving consumers in HIV community planning *[See Module*

2, Activity 2.6: Role Play on Consumer Roles] and on group process *[See Module 9, Activity 9.2: Clearfield Pigeon Problem Role Play].*

  - **Peer teaching or training** by individuals or groups of participants. Teaching others is a good way for members to enhance their own knowledge and skills, and involvement of multiple trainers helps keep longer orientation or training sessions interesting. The *Training Guide* and the *Compendium of Materials for PC/PB Support Staff*[9] both recommend PC/PB officer and/or Membership Committee member involvement in planning and providing new member orientation and training *[See Compendium, Section 4, Membership, Best Practices for Consumer Recruitment and Retention]*.
  - **Individual or committee assignments** appropriate to the topic, such as development of a consumer survey or planning and management of a community forum. Often PC/PBs that have annual retreats use part of their time to develop committee work plans. See the EGMC website[10] for a model worksheet for developing committee work plans.
- **To make experiential activities effective, it is usually helpful to make them realistic,** by presenting situations participants are likely to encounter and tasks they will need to carry out in applying what they learned during the training. Refine *Training Guide* scenarios to fit situations that might occur in your EMA or TGA. Provide information that accurately describes situations facing your PC/PB or its committees or community.
- **There are times when a very different situation can be useful in highlighting broad issues or lessons.** For example, the Clearfield Pigeon Problem role play in Module 9 of the *Training Guide [Module 9, Activity 9.2]* is a deliberately fanciful situation, but is set up to highlight issues related to group problem-solving. It has been used successfully in regional training for consumer members of PC/PBs and in many other situations.[11] The roles and perspectives reflected among the people who attend the role-play meeting are very different from PC/PB member backgrounds and interests, but do reflect the importance of differing interests and viewpoints and the importance of finding ways to reach common ground for decision making and problem solving. Similarly, Module 5 provides several activities to help PC/PB members practice skills in priority setting, resource allocation, and directives development by using information and data from a mythical Part A jurisdiction *[See Module 5, Packet of Supporting Materials for Activities 5.2-5.5].* It can be helpful for participants to work with made-up information, since they are able to focus on the process of decision making rather than the content of the data.
- **In developing your own activities, review, adapt, or borrow from training activities such as those provided in the *Training Guide* or available from other sources.** The *Training Guide* provides over 35 activities, many of them including multiple scenarios or questions for discussion. All are listed in the Introductory Chapter as well as in the

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[9] See https://targethiv.org/planning-chatt/pcs-compendium.

[10] See https://egmc-dc.com/planning-council-support-resource/planning-council-support-materials/.

[11] The role play was used during a series of regional training sessions for consumers in 2004, and included in the manuals developed by JSI for that training, “Increasing Consumer Involvement: Ryan White Planning Council Training.”

Trainer Notes for each module. Each activity includes detailed trainer instructions and all needed handouts. Reviewing these training activities, designed for use with similar participants, can help you decide which types of activities seem most appropriate based on the topics you want to cover, the targeted participants, and the length of the training. Then you can modify these activities to fit your PC/PB's training needs. Even if the content is completely different, the process used and the handouts provided can help you develop similar activities for the topics and content you want to cover.

5. Handouts/Reference Materials

- **Written materials provided at training sessions help participants retain and use new information and skills.** Participants may have an opportunity to apply some of what they learned immediately, but it may be days, weeks, or even months before other new learning is used. Reference materials help ensure that they can find and review the information when they need it.
- **Training handouts should always include the agenda, and a copy of your PowerPoint if you used one or main points from the session if you did not.** Many PC/PBs give members a large three-ring binder at orientation, and then provide pre-punched handouts at later training sessions so they can go into that binder.
- **Include a quick reference document.** If the training focused on a particular legislative responsibility like PSRA, provide your PC/PB's policies or processes for that role. If you discussed committees, provide a committee chart and a description of the roles of each committee. If the focus was skill training, provide a list of steps or a set of hints for applying the skill to their PC/PB activities. The *Training Guide* includes more than 20 "Quick Reference Handouts", at least one for every module; many summarize information about Part A services or sound practices for PC/PBs, and should be usable with few or no changes *[For example, Module 2, Handout 2.3: Quick Guide to RWHAP-fundable Service Categories; Module 7, Handout 7.2: Assessment of the Administrative Mechanism; or Module 9, Handout 9.6: Ten Strategies for Inclusive HIV Community Planning]*.
- **Be sure to file a full set of handouts and related materials for use in providing similar training in the future.** Often similar training is needed annually based on the planning cycle or every two to three years based on PC/PB member terms. If the trainers prepared notes, include the notes in your files. This will make it much easier for future staff and PC/PB leaders to plan and implement similar training.
- **When training focuses on development of policies or processes, written plans, or other "products," include sample materials** that can be used as models. For example, include a sample committee work plan or multi-year needs assessment plan. If you don't yet have your own samples, the *Training Guide* provides some *[For example, see Module 4, Handout 4.2: Multi-Year Needs Assessment Plan].*
- **Check to see what already exists,** then build on it, update it, or refine it to your specific needs. Look for sound practice model materials on the Planning CHATT website and

elsewhere on the TargetHIV website, do an Internet search to see what is on PC/PB websites, and/or ask other PC/PB support staff to share samples from their PC/PBs. Also look for materials shared by PC/PBs on the EGMC website.[12]

- **Include a bibliography,** including web addresses where materials can be found or purchased. Even if you have only a few documents to recommend, always offer sources for more information. Use a simple but consistent format, so people will always know who developed the material, date developed, and where to find it. Also include a sentence or two to explain what kinds of useful information it contains, so participants can decide whether it is likely to meet their needs. For example, if you train on parliamentary procedure and are including a particular quick-reference guide, explain what it provides, why it can be trusted, and where to find it online. Descriptive information is more useful than just a bibliographic reference. *For example:*
  - "The A-B-C's of Parliamentary Procedure," undated. A 16-page plain-language pocket guide to *Robert's Rules of Order* developed by the American Institute of Parliamentarians. Covers meeting agendas and the typical order of business; the five general types of motions; and procedures for proposing, discussing, and voting on motions. See https://www.channingbete.com/The-A-B-C-s-Of-Parliamentary-Procedure/p-CBC0022.

6. Training Evaluations

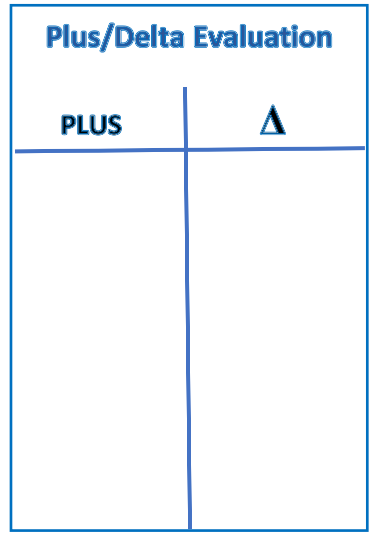
- **Always ask participants to evaluate training.** It is the only way to be sure you know what worked and what didn't so you can continuously improve. While an immediate post-training evaluation cannot determine the long-term impact of training, it can measure perceived quality of the training content, materials, and delivery; determine whether participants feel training objective were met; and provide a sense of whether participants expect to do anything differently because of the training.
- **Immediate post-training evaluation doesn't take long**. Ten minutes at the end of training usually gives participants time to complete a brief, well-designed written form. If some participants have limited English literacy, either translate the form or use an oral process with an interpreter. If some participants have limited literacy, consider an oral evaluation process.
- **Training objectives should provide the basis for the evaluation.** List objectives and ask to what extent they were met. This gives you some sense of probable training outcomes. Even if they say they learned how to do something, there is no assurance that they will be able to apply it in their PC/PB work – but a positive response indicates that they feel they learned something.
- **When using a written form, use mostly rating scales or closed-ended questions,** so participants just need to check a box. This makes the form quick to complete and results

[12] See https://egmc-dc.com/planning-council-support-resource/planning-council-support-materials/ or ask EGMC for help in finding materials through the PCSResource email, PCSResource@egmc-dc.com.

easy to tabulate. If you give numerical scores to responses (e.g., use a 5-point scale where 1 = lowest and 5 = highest), you will be able to combine responses and provide a numerical assessment of the training. (See sample assessment form at the end of this section.)

- **Always ask about expected longer-term training results – which usually means asking whether the participant will do something new or different as a result of training, and if so, what.** Ask about:
  - The most important thing(s) they learned in the training.
  - What they expect to do differently as a PC/PB or committee member because of the training.
- **Also ask about the training process/flow and quality** – including trainer knowledge and skills, quality and usefulness of handouts, how well the agenda flowed, quality of facilities, value of the group interaction and any experiential activities, and other process aspects of the session.
- **Provide several open-ended questions** so the participant can comment on strengths and weaknesses or limitations of the session, or provide other comments.
- **Ask what follow-up is needed,** such as additional training, mentoring, or opportunities to use new information and skills.
- **Keep the evaluation short and simple** – no more than two pages for a written form. If you use an oral method, limit yourself to 3-5 questions.
- **Keep written forms anonymous**. It is all right to have participants indicate their participant category (e.g., PC/PB member, committee member, potential member, PC Support staff, recipient staff). You may want to ask how long they have served on or been involved with the PC/PB. Just be sure the information isn't so specific that the person tabulating the responses can figure out who provided the responses.
- **If you do remote training, using some form of web connection, use an online assessment form.** Either automatically post it at the end of the training, or send it to participants via email. Computer-based assessments are easy to design, implement, and tabulate.
- **Stress early in the session the importance of the evaluation process,** and be sure someone catches those who leave early and gets them to complete assessment forms. If they leave really early, mark this on the form; if they didn't receive all the training, they won't have a chance to learn all the skills!

- **If you want to understand what participants found most and least useful through an oral assessment, consider using a "plus/delta" format.** In this method, you draw a vertical line down the center of a sheet of "easel pad" paper, and label the left column "Plus" and the right column "Delta or "Δ." Then go around the room, asking each participant first to identify "pluses"—things they liked about the session and learned from the session—and then to identify "deltas"—things they would like to change, such as information they would have liked to get from the session but didn't, or additional activities or reference materials. This approach does not provide anonymous responses, but does provide a non-threatening way to learn about participant satisfaction and learning.



Sample Evaluation Form for New Member Orientation

1. **Overall, how useful was the orientation for new members?**

   ❒ Not at all ❒ A little ❒ Moderately ❒ Very

2. **Following the training, to what extent are you able to:**

Objectives	Not at all	A little	Somewhat	Largely	Fully
1. Describe major Planning Council and recipient roles, responsibilities, and boundaries	1	2	3	4	5
2. List 5 major expectations of individual Planning Council members	1	2	3	4	5
3. List the Planning Council's 5 standing committees and their key duties	1	2	3	4	5
4. Identify 3 readily available online sources of information about Ryan White Planning Council roles and operations	1	2	3	4	5

3. **Please rate the following aspects of the training:**

Aspect of Training	Poor	Fair	Good	Very Good	Excellent
Presenter/Trainer					
Overall skills as a trainer	1	2	3	4	5
Knowledge of Ryan White Program	1	2	3	4	5
Ability to keep participants engaged throughout the training	1	2	3	4	5
Ability to answer participant questions	1	2	3	4	5
Training					
Content of the orientation	1	2	3	4	5
Reference materials and handouts	1	2	3	4	5
Overall organization and "flow" of session	1	2	3	4	5
Level of interaction among participants	1	2	3	4	5
Use of interactive exercises	1	2	3	4	5

4. **What were the greatest strengths of this session?**

5. **What are the most important limitations or weaknesses of this session – the things you would most like to change?**

6. **Do you expect to do anything differently because of the orientation?**

   ❒ Yes ❒ Not Sure ❒ No

   If yes, what?

7. **What, if any, additional orientation or training do you need to be an effective Planning Council member? [Check up to 3.]**

❒ None
❒ More information on the Ryan White HIV/AIDS Program legislation and Parts
❒ More in-depth information on Planning Council and recipient roles and responsibilities
❒ How to carry out specific Planning Council roles (Which ones? ______________________)
❒ Parliamentary Procedure/Robert's Rules of Order
❒ Understanding of the system of care in this jurisdiction
❒ Understanding and using data – for data-based decision making
❒ Planning Council member roles as both an advocate and a planner
❒ Other (Specify____)

8. **Please add any additional comments or suggestions.**

9. **Are you:**

   ❒ A new Planning Council member (serving for less than 3 months)
   ❒ A new Planning Council member (serving 3-12 months)
   ❒ A new committee member but not a Planning Council member
   ❒ A Planning Council member who has been serving for more than a year
   ❒ A Planning Council or recipient staff member
   ❒ Other (please specify ____)

VI. Training Equipment, Materials, and Room Arrangements

A. Equipment and Materials

The following equipment and materials will probably be needed for your training sessions:

- **Easel pads or whiteboards**, to summarize information during the training. Easel pad paper can be used by a trainer/facilitator to summarize expectations or brainstorming responses, which improves retention and provides information for reference. Where the group is relatively small – for example, when you are training a committee rather than the whole PC/PB – some groups prefer prepared easel pad sheets to a PowerPoint.
  Hints:
  - Where you want written notes to be available for reference throughout the training, use easel pads rather than a whiteboard, since a whiteboard will fill up and need to be erased.
  - Number and save easel pad notes or photograph them or whiteboard summaries, since you may want to type out some of the information for future use, especially if the session involved some planning activities.
  - If you are the only trainer, arrange for someone else to take notes, since it is hard to manage a group or be heard with your back to participants.
  - Be sure that the person assigned to summarize discussion on easel pad paper prints clearly and makes notes large enough to see from the back of the room.
  - Post the easel pad paper where it is visible during training for ongoing reference; sheets that stick to the wall make that easy.
  - If you do not have self-sticking easel pad paper, you will need either narrow masking tape or stick pins, which will not damage walls – be sure to ask about any restrictions regarding posting of materials when you are negotiating with a possible training facility.
  - Give each small group several sheets of easel pad paper, for summarizing their work for presentation to the full group, and also for taking notes during their discussion.

- **Markers,** both for your own easel pad or whiteboard notes and for use by small groups in summarizing their work.
  Hints:
  - Be sure you have new, thick black, blue, or red markers for taking notes and for use by small groups.
  - Do not use lighter colors for notes, since they are much less visible, especially if the group is large. Include other colors like green only for highlighting notes – and for artistic use where participants are asked to prepare drawings or make their presentations attractive.
  - Scented, alcohol-based markers can cause migraines or allergic reactions, so try the kind with link that is low-odor water-based (but permanent).
  - Remember to have dry-erase markers for whiteboards. Many a whiteboard has been damaged by accidental use of the wrong type of marker!

- **Conference room audio-visual equipment,** to make sure everyone can hear each other and to show pre-prepared materials, most often including:

- A PowerPoint projector or similar equipment to show a PowerPoint or project other information, if the room does not include a built-in projector. If you are training outside your own facility and there is a projector in the room, check on the type of connector needed if you are using your own laptop.
- Microphones for the trainer and for participants if the room or the participant group is large. Often trainers use a wireless lavalier microphone that fastens to their clothes. Microphones for participants could include a microphone on each small table or several wireless microphones that are passed among participants by staff.
- Any special equipment such as an external drive or other equipment needed to play films or videos as part of training.
- An audio or video recorder and player to record the session, or to record participants doing role plays or other specific activities and replay the recording so they can see themselves and be critiqued in a skill development session. Some PC/PBs record required orientation or training sessions so that members unable to attend can meet the requirement by viewing the recording. Video recording requires both reliable equipment and some level of expertise, especially when the session involves a lot of interaction between the trainer and participants.

Hints:

- If a whole session is recorded, someone other than the trainer should be responsible for the recording. Preparation is needed to be sure the trainer and participants can be heard on the recording, and the trainer should have a microphone that is wireless and hands-free.
- If you are doing skills training, be sure the trainer is comfortable with recording group activities and then showing them for review and discussion.
- If you record a session using audio or video, ask at the beginning whether participants are comfortable being recorded, and be sure that doing so will not inhibit participation. Some jurisdictions require written permission for such recordings.
- Be sure to arrange for all needed equipment well in advance of the training, and test audio-visual equipment before the session starts.
- If you are using someone else's laptop, make sure you have the right cables and connectors and any required passwords.

* **Equipment and arrangements for interpretation** for limited-English-proficient (LEP) and/or deaf/hard of hearing participants. The PC/PB may need to provide the following:
  - Earphones and related equipment for LEP participants, so they can hear the interpreter without disrupting the process.
  - If more than 2-3 participants need interpretation and you want their full involvement, provide earphones for everyone, with simultaneous two-way interpretation, so both English-only and LEP participants know what everyone is saying in real time.

  Hints:

  - Interpreters, especially those associated with companies, may be able to bring their own audio equipment.
  - If earphones are not used, LEP participants will need seating near the interpreter.

- For American sign-language (ASL) interpretation, no equipment is required, but the room arrangement should ensure that the interpreter is easily visible to participants who need interpretation, who should be seated in front of the interpreter.
- Remember that interpretation will be needed in small groups as well as for lecturettes and full-group discussion. This may mean putting people who need interpretation in a single group, or having more than one interpreter.
- For a long training session, you may need two interpreters (for ASL or foreign languages) to share the duties.
- Be sure you hire interpreters knowledgeable about health and HIV.

- **Other materials:** These may include:
  - Name tags or name tents, for participants, trainers, and staff
  - Pens
  - Paper for note-taking
  - A pocket folder for use if you have multiple handouts (you can put some lined paper for notes into one pocket)
  - Handouts copied onto 3-hole paper, so they can be added to a PC/PB member's manual or reference binder
  - Play items to keep participants' hands busy and increase attention spans, especially for people who do not normally spend a lot of time in meetings or training; popular choices include colored pipe cleaners and small party-size tubs of modeling dough. Sometimes a prize is given for the best artistic creation.

- **Equipment, software, and arrangements for remote training:** While face-to-face training has many benefits, especially for new member orientation, getting people together can be challenging. Video conferencing software for remote training has improved in recent years. If your Open Meeting laws and PC/PB Bylaws allow people to connect remotely for PC/PB or committee meetings, you may already have some of the technology needed for remote training. However, since training is most effective when it actively engages all participants and enables everyone to see as well as hear each other, you may need some additional equipment, software, or skills to make remote training effective. Consider the following:
  - **Video conferencing services:** Experiential training calls for a video connection with participants, not just an audio connection like a telephone conference call. Many video conferencing services exist, and they are paid for by the host (the PC/PB), not the participants. However, participants need a computer, tablet, or other device so they can download the software and log into the training. Most video conferencing services also have apps for use on a smart phone, though the small size of the screen is a disadvantage. Costs for video conferencing systems vary considerably, usually monthly fees based partly on the maximum number of people who can connect and the options available. The more sophisticated video conferencing software allows for interaction through polling, chat rooms, "open microphones" for discussion among participants and trainers, and the ability to divide people into online small groups for activities. Trainers may need to learn how to make full use of these capacities. Among the highly rated video conferencing

services are GoToMeeting, Microsoft Teams, Zoom, and Cisco Webex.[13] Many of the services have a free version, but there are often strict limitation on number of participants and number and length of conferences.[14] A PC/PB may well need more than the free version, but costs for many of the services are low, often less than $15 a month for a single host and up to 100 participants.

- **Conference room microphones:** Active learning requires that all participants be able to hear each other. Hearing all participants can be an issue even when everyone is in the same room. When the trainer and most participants are in the same room, but a few participants are connecting remotely, the room needs microphones that enable the remote participants to hear everyone, not just the trainer. A trainer who is remotely located also needs to be able to hear all the participants. This usually requires use of some form of microphone that picks up comments from everyone. Many relatively low-cost conference room microphones are available, such as boundary and ceiling microphones that transmit conversation from multiple participants and in some cases minimize background noise. Prices begin at about $100.[15] Different types of rooms need different arrangements.
- **Webcams:** Interaction during training is greatly improved when everyone can see as well as hear each other. People who connect remotely through their computers and have a built-in or added webcam with video and audio can typically choose to use their video and be seen on everyone else's screen. A remote trainer can do the same. If most participants are in the same room, the challenge is to have a webcam that will show the whole room or can be directed to a particular table or person. This can generally be accomplished with a webcam and some form of tripod so the webcam can be set up where it shows the room rather than just the person sitting at the computer. Often the webcam and tripod together cost about $80 to $100.[16]

B. Training Rooms, Room Set-Up, and Seating Arrangements

Meeting space: Often, orientation and training are provided in your regular meeting space, and you already know the challenges. If you are using space at a subrecipient, church, or other community facility or conference center, be sure you visit the space. In decision making, and in planning after choosing your site, consider the following:

- **Safety** (especially if a session ends after dark in the winter) and access by public transportation and/or availability of parking are always important factors.

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[13] Chad Brooks, "Best Video Conference Services 2020" Business News Daily, June 29, 2019. See https://www.businessnewsdaily.com/9556-best-video-conference-services.html.

[14] "The 9 Best Free Web Video Conferencing and Screenshare Apps of 2020," VOIPREview.org. See https://www.voipreview.org/free-web-conferencing.

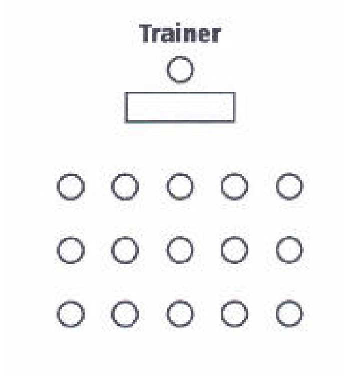
[15] "The 13 Best Conference Room Microphones of 2020," VOIPReview.org. See https://www.voipreview.org/business-voip/best-conference-room-microphone.

[16] See "The Best Webcams," updated December 11, 2019, Wirecutter, at https://thewirecutter.com/reviews/the-best-webcams/; and Liza Brown, "Best Webcam Tripods and Stands in 2020," January 15, 2020, Filmora, at https://filmora.wondershare.com/webcam-recording/best-webcam-tripod-stand.html.

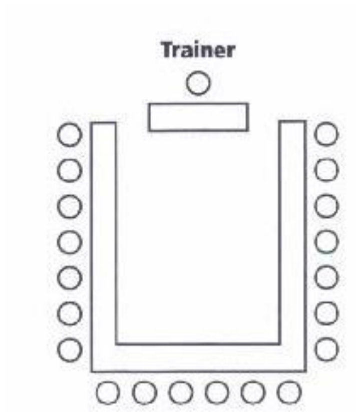
- **Multiple rooms or large space:** An all-day or multi-day session for the entire PC/PB may call for both a large training room and one or more breakout rooms for small groups. While you can have small groups work at their tables, the room can get very noisy if breakouts involve groups of more than 6-8 – for example, if you do breakouts by committee. Breakout rooms are more comfortable in these situations, and the process of moving into another space can provide a useful break and increase attention.
- **Wall space:** If you expect to use easel pad paper for small-group reporting and other notes – and if you want to post these notes where the group can see them – look for a room with a lot of clear wall space. Sometimes a training room has art work, a temporary divider, or something else that limits space available for posting notes. Find out ahead of time if there are any restrictions about what you can post, due to fear of damage to walls.
- **Windows:** A room with windows allows members to use longer-range vision, and an interesting view improves the attractiveness of the training space. However, windows need shades to avoid excessive sun or shadows, especially if you are using a PowerPoint projector.
- **Lighting** is important, especially in winter or on dark days. Insufficient lighting makes it hard to concentrate, see easel paper, or take notes. Too much lighting near the projection screen or wall makes it hard to see what is being projected.
- **Acoustics:** Always check the acoustics. In some rooms, high ceilings or other factors can make it very hard to hear – and make microphones necessary for both trainers and participants making presentations. Sometimes the noise level becomes so high that small groups have trouble hearing people at the same table. If you know the challenges ahead of time, you can arrange for needed microphones or other aids.
- **Temperature:** Pay attention to the temperature in the room. If it is too hot, participants may fall asleep. If it is too cold, they are likely to be uncomfortable. If you know the facility tends to be quite warm or cold, warn participants ahead of time, so they can dress accordingly.
- **Background noise:** Many old buildings have room air conditioners or extra forced-air heating that make a lot of noise. Background noise may require use of microphones, even if the group is not large – and can reduce concentration and tire participants.

Seating arrangements: 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 – such as "theater" style or "classroom" style arrangements with the trainer behind a podium or table:



- Most PC/PB training involves a lot of small-group work, so avoid a seating arrangement that may work well for formal meetings but doesn't allow small groups to separate themselves and work together comfortably:



- Choose an arrangement that enables members to work comfortably both in small groups and as a full group – where members are able to take notes and see the trainer during full-group presentations and discussion, but also see each other when doing small-group work, like the following: