Priority Schools Campaign

Training Tips

NATIONAL EDUCATION ASSOCIATION

Priority Schools Campaign

The Power of Delivering Successful Training Sessions

Family School Community Partnerships

Adapted from NEA Urban Initiatives- Family Community Partnerships 2004

Conducting the Family-School-Community Partnership Training will require that you work in concert with other trainers, stakeholders, and the participants. Each will have her/his own "style" and set of experiences to contribute. Here are a few tips that will help you become a more effective facilitator, be a contributing member of the training team, and allow the participants to gain the most from the experience.

Pre-Session Planning and Preparation

This section helps you to prepare to facilitate the family-school-community training modules.

For these modules, adequate preparation prior to the training event is especially important.

Some of the things you need to take into consideration include:

- Establishing the purpose and objectives for the training session;
- Considering room arrangements;
- Setting the agenda;
- Preparing the meeting place in advance of the training;
- Having all necessary materials for the facilitator/instructor and for participants, etc.;
- Carefully considering the chemistry of the group;
- Preparing yourself as a facilitator;
- Planning discussion questions;
- Talking with co-facilitators, or guest speakers (if appropriate), in advance of the training to clarify roles during the training.

These tips on planning and preparation prior to training delivery are discussed over the next few pages in greater detail.

Establish the Purpose and Objectives of the Session

Successful training sessions don't just happen. Having an effective structure aids in facilitation and ensures participant involvement. Before you can work on the facilitation processes that also directly contribute to a training's success, you must focus on its purpose and objectives.

The purpose of the session is the reason for bringing together the participants. Simply ask yourself: *For what reason are these particular individuals coming together?*

The objectives of these family-school-community partnership training modules refer to specific learning objective statements that are located throughout the training and identify what is to be accomplished during specific activities and throughout the time the participants are together for the training. These objectives do some important things:

- They create a common expectation among all the participants.
- They focus the session.
- They provide a standard against which the actual outcomes can be compared to determine a training session's effectiveness and productivity.

TIP: Write the purpose and objectives of a session on flip chart paper and post them prior to the event for all participants to refer to throughout the time they are together.

Setting the Agenda

As the session's facilitator, you will be responsible for setting the agenda for each module.

Questions you will need to ask once you know what module you will be delivering include:

- *What are the most important things that participants should have by the end* of *the training? What information? Insights? Attitudes? Skills?*
- *How does the content of this training link to other family-school-community issues?*
- *How can I incorporate the themes and specifics* of *partnership building into the training?*

Activities, such as warm-up, knowledge, and skill-building activities, and session evaluations also may be identified in the agenda.

In addition to identifying the substantive content of the agenda, you will need to include the meeting logistics (time and place) as well as a list of the participants.

Using Handouts

Handouts enhance the group's functioning and support the group's task by providing them with background information and reference materials throughout the training. When used effectively, handouts can clarify and reinforce ideas and skills applications. However, not all materials need to be literally handed out to the participants. They also may be contained in a folder or notebook at the beginning when the training session convenes.

TIP: Participants often like to receive two sets of handouts: One to write on during the session, and one to keep clean for future sharing with others. Another option is to provide sticky notes for participants to insert notes and keep pages free of marks.

Considering Room Arrangements

In preparation for a training session, consider the elements of the facility and the purpose of the session before participants arrive. The first consideration is to ensure that seating is appropriately arranged. The seating arrangement should provide for the participants' comfort when viewing audio-visual presentations and listening to the facilitator and other participants. Don't forget about accommodations for the disabled. Where possible, determine beforehand if any participants have limitations and accommodate them.

Regarding set up, note that round tables are preferred for most group sessions. However, sometimes conditions dictate that you do the best with whatever is available.
Sessions of 20-25 participants are designed for 5 round tables seating five people at each table. The ideal setup for groups of that size is shown below.

TIP: Because schools are encouraged to bring a team representative of their community to this training, participants should be able to sit together with their teams. This will enable the participants to share information and work together during the activities so that they can readily implement what they've learned together following the training.

Materials The purpose of the session, the size of the room available and the number of participants will determine the most effective layout. Seating arrangements encourage eye contact and adequate hearing among participants and with the facilitators. The ability to view audio-visual materials is a necessary consideration as well.

For the training to be most effective, the room must accommodate the following:

- Wall space for posting flip chart paper
- Space to seat everyone comfortably
- Adequate space for movement during exercises
- A table for facilitators
- A table for reference materials (if appropriate)
- A table for all materials that will be used in the program, such as handouts and surveys, arranged in the order they will be used
- Adequate space for any audio-visual equipment—overhead, screen, and flip charts with easels (CD-ROM and/or LCD projection equipment if appropriate)

In addition to school and/or district facilities, motels, hotels, or conference centers can provide accommodations that are suitable for certain types of sessions and workshops where there are few distractions and there is freedom to move about.

TIP: Asking local businesses (e.g., banks, museums, community centers, public libraries) to donate space for a meeting is a win/win. It is an ideal way for members of the community to contribute, and it takes the staff out of the school building. This can contribute to thinking "outside the box" and can feel refreshingly different.

Covering the Basics

Know the necessary administrative and housekeeping issues, such as locations of needed facilities, times for morning, afternoon, and lunch breaks. Share this information with the participants.

Create a checklist to ensure you have all needed materials. This includes:

- Handouts for the participants, (enough copies, plus a few extra);
- Appropriate reference materials;
- AV equipment (does it work?);
- Flip charts, easels, markers;
- Room conveniences, such as adequate wall space for posting newsprint, water, waste baskets, etc.;
- Food for snacks, soft drinks, and lunch breaks as appropriate.

Be sure to have the name of a contact to support you if there is something you need that is not available to you.

Preparing for Your Session
Facilitators who are working with participants in the family-school-community training environment need a strong foundation in the skills of leadership, team building, and conflict resolution. Their skills can mean the difference between success and failure of the training session/program.

No one consciously plans a failure. Facilitators plan for success, hoping that their presentations, styles, and contributions will provide a meaningful learning experience for the participants. Subconsciously, however, if facilitators are not fully prepared for the training and are not fully knowledgeable about the content and materials, a casual, informal attitude will come across as inadequate preparation. Jokes and humor could come across as a mechanism for carrying a facilitator through the program while other team members provide the input and interventions. On the other hand, if facilitators prepare thoroughly and work together as a team, a casual, informal approach will create a climate conducive to learning and to sharing both information and feelings.

Becoming a successful facilitator requires careful and intensive preparation as well as flexibility, and knowledge of and belief in the program. Only then will the facilitation team be effective in modeling appropriate behaviors and in creating conditions for family-school-community partnerships.

To support the Family-School-Community Partnership Initiative, you are going to need to switch between a facilitator's role and a trainer's role. The following discusses some important issues you will face in your role as a trainer/facilitator.

Facilitating with Success
By following these six rules, a facilitator can prepare and plan for success.

1. Know your materials.
2. Know yourself and your training/facilitation team.
3. Know your participants.
4. Be flexible.
5. Give and receive feedback.
6. Learn from your own experience.

Rule I: Know your materials.
It is essential that those selected to do the training are willing to invest whatever

amount of time is required to prepare. For some, it may be a matter of reading through the entire manual once. For others, it may be a matter of reading each module, practicing presentations with a tape recorder, or running through the modules with co-trainers. Whether it requires five hours or five days depends on your degree of comfort in delivering the program.

Rule 2: Know yourself and your training/facilitation team.
Closely related to "knowing your materials" is knowing yourself and your role as a facilitator.

Being a facilitator requires:

- Working with your co-facilitators and the participants to recognize and develop each one's potential for partnership involvement.
- Being open and honest in your own feelings and attitudes.
- Setting aside your own needs to control, to be the expert, to have visibility, to be liked. If your needs and the group's needs can both be met, so much the better. If not, the group's needs come first
- Being able to relate to the participants and accept whatever level of personal awareness of growth they may be at.

Note: Refer to the results of the "Self-Assessment Activity" to determine ways you and your facilitation team can work together and be mutually supportive.

TIP: Facilitators manage discussions, not lead them, keeping things moving forward and keeping the dialogue focused on the topic.

Set aside enough time to meet together with your co-facilitators as a team at least once prior to presenting the program. Get to know one another. Establish ground rules for working together. Do you add information to each other's presentations? Does each facilitator handle a specific part with no input from the others? Who is responsible for what? Who will do what? Who will be the coordinator to ensure that each facilitator fulfills assigned responsibilities? Work out any differences before the training begins.

Share the limelight, give equal visibility. Recognize, support, and build on each facilitator's contribution. Modeling collaborative behavior is an ideal way for participants to learn the technique. Meet afterwards with your team to see how you did. Give and receive feedback.

Rule* 3: *Know your participants.
Ask yourself, and validate with your co-facilitators, what the participants might expect from the training.

They may want a challenging new experience:

- Information that is new or reinforcement of what is already known;
- Involvement in their learning process;
- A sense of accomplishment through participation in the family-school-community partnership initiative.

Or, they may want to test their knowledge against the facilitation team's.

Be sure to know the gender and racial composition of your participants and what influence these differences may have on their participation. Know also each of their functional roles and what effect their school/family/community positions may have on class participation and team building. Consider seating arrangements that will maximize comfort and participation based on your assessment of the demographics. Note that schools are encouraged to bring teams whose composition represents the diversity of their communities. For the training to be most effective, it is important that they sit together throughout the program.

Ask yourself also what reasons the participants might have for attending the workshop. Motives could include:

- Fulfilling a supervisor's request
- Interest
- Invitation
- Curiosity
- Means of escape
- Observation of training and learning styles
- Job betterment or job requirement
- Social reasons
- Desire to learn

Whatever the reason, it significantly influences their behavior when they first enter the training room.

To understand the groups you will be facing, try to reflect on your own experience in entering a new group. Were you nervous but trying to appear casual and relaxed? Did you smile a lot to convey an image of belonging although you felt like an outsider? Or were you uneasy, adopting a "wait and see" attitude, or shy, responding only when someone spoke to you first? Were you angry or thinking of other things you could be doing? Did you feel warmth when you met another's eyes and exchanged smiles? Were you uptight? Would you be able to speak, be heard, make friends, or would you be singled out and rejected? Did you feel authoritative? Or were you excited, anticipating a new, meaningful experience? Your participants, in all probability, will experience a combination of some or all of the feelings and reactions you have had.

You can help get the training off to a good start by making the participants feel welcome.

TIP: Find out who is coming in advance so that names will be more familiar to you when participants arrive. Match names with faces. Name tents are very helpful in this process. In addition, try to learn as much as possible about the participants beforehand. Knowing the participants gives them a sense of importance and engages them more personally in the learning.

Arrive early enough (at least one hour) to set up the training room, check last minute details, and ensure that all materials to be used are readily accessible. It is time consuming and distracting to search for a document you need while you are conducting the training.

Allow time to greet the participants as they arrive. Welcome them using their names, introduce them to others. Be accessible to participants at all times. Be available to them during breaks. Some may not yet feel comfortable talking in front of the entire group.

Rule 4: Be flexible.
A major factor in the success of any program is the ability of the facilitators to be flexible.

The ability to be flexible requires that you know your materials, know yourself, know your participants, and be grounded in the purpose and objectives of the session.
The major task of the facilitator is to help the participants develop their potential and learn from the experience. Wanting to be helpful and being helpful is the difference between fantasy and reality. What was a stimulating experience in one group may be an inappropriate bore in another. An exercise that focuses on a problem with which the group is unconcerned can be viewed as a waste of time or meaningless game playing. Being flexible means responding to the specific situation and to the participants' needs.

Rule* 5: *Give and receive feedback.
The most powerful tool for determining your effectiveness as a facilitator is allowing time for you and your co-facilitators to reflect on the session and offer each other feedback. This feedback should be both "giowing and growing." What went really well and why? What didn't go so well, and how can you make it better?

The time should be spent discussing:

- How some situations might have been handled differently in order to be more effective and productive;
- How individual actions might have helped or hindered group progress;
- How individual presentations came across and what, if anything, could be done to improve them.

The feedback method will be most beneficial to your personal growth, the facilitation team's effectiveness; and—that ultimate payoff—a continuously improving organizational environment that fosters maximum learning for all.

Rule 6: Learn from your own experience.
This is a personal commitment. Accept the positive feedback and continue to build on it.

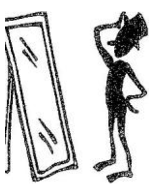
And above all else, learn from your personal experiences.

Working as a Facilitation Team
Facilitating sessions will require you to work in concert with other trainers, facilitators, and stakeholders. Each will have her/his own "style" and set of experiences to contribute.

Here is an activity that will help you become a part of the facilitation team, help you be a more effective facilitator, and allow all session attendees to gain the most from their training experience.

Activity: Self Assessment of Skills

Directions: Listed on the next page are several skill areas in which you as a training facilitator need to be proficient. Take a moment and indicate in the appropriate column how you think you rate. After you finish the assessment, discuss with trusted colleagues or fellow facilitators the ways in which you can assist each other in the "Needs Work" areas.



SKILL AREA	I DO WELL	NEEDS WORK
Giving oral instructions		
Giving constructive feedback to individuals		
Being flexible		
Receiving feedback		
Delivering oral presentations		
Keeping the group on task		
Conducting group activities		
Maintaining trust with my fellow facilitators		
Keeping to a schedule		
Expressing personal opinions and feelings		
Managing conflicts with my co-facilitators and among the participants		

While discussing the assessment, consider the following questions.

1. What norms do we as a facilitation team want to establish. For example:
   - How will we elaborate on a point that someone else (facilitator or participant) has made?
   - What protocol will we use for giving feedback to participants and to each other?

2.How can we help each other be more responsive to participant needs?

3.What does each of us need from the others in order to be successful?

4.As a team, what are our strengths? Weaknesses? How will we grow our capacity to be more effective together?

During The Session

"Remember, you can have your way more *often if you have more than one way."*

Establishing Norms

Establishing norms or ground rules for the duration of the session is important. Agreed upon group norms can help create a climate that encourages trust and group participation and promotes a collaborative learning community. Rules for healthy conversations have been included in the training modules. However, here are some examples of additional norms/ground rules that facilitators have established during training sessions:

- Speak your ideas.
- Respect and listen to others.
- Presume positive intent and accept statements of others as gifts to the group.
- Be *fully* present in the session.
- Honor confidentiality.
- Give freely of your own learnings, your own experience, if you choose, but not the words and experiences of others.
- Focus on the training experience and learn from what happens.
- Suspend judgment and critique, if possible.
- Own the judgment that does take place within you.
- Go beyond your comfort zone.
- Show a willingness to reach consensus.
- Everyone has an equal voice (no rank in the room).
- Attend to all aspects of yourself—the mental, the emotional, the physical, and the spiritual.
- Be an active listener.
- Keep a sense of humor.

A major focus of norms or ground rules is to create a learning community. Attributes which work together to create an environment that encourages members to feel part of a learning community include:

- Establishing boundaries
- Promoting emotional safety
- Encouraging a sense of belonging/identification
- Ensuring learners have a personal investment

To maintain a learning community, members need to feel that they have:

- Influence
- Integration and fulfillment of needs (intellectual and emotional)
- Shared emotional connection with other participants

Norms and ground rules like these can help encourage an environment of trust that promotes group sharing of information, opinions, and perspectives.

Be sure to review all ground rules with participants and ask them what ground rules they would like to see included. Identify the process by which information will be exchanged within the session—discussion, small group activities, lectures, etc.—and how participants will be recognized and/or called upon to participate. The idea is not to have an exhaustive list, but a few guiding principles to promote participation and foster collegiality.

TIP: Once ground rules and procedures have been set, write them on flip chart paper and post on the wails for participants to be aware of them throughout the training session, or subsequent related training sessions with the same group of participants.

Reinforce and Clarify Purpose and Objectives **of** ***Sessions***

After a short warm-up, energizer activity and/or introductions, start the session by going over the agenda. Gather participants' expectations and consider if any modifications may be needed. Amend time estimates as appropriate.

If the session is one of a series, be sure to include a brief overview of the purpose and objectives of future sessions and explain how they relate to the current session.

The concept of "Parking Lot" or "lssue Bin"

- During any group session, issues may surface that are beyond what is or can feasibly be covered in the time allotted. However, facilitators need to plan how they will process these issues. Designating a *"parking lot'* or *"issue bin"* is a good first step, but only a first step. As the facilitator, you will need a process to address what is *in* this area. During your prep time, you may want to discuss with colleagues or your co-facilitators how certain issues will be addressed during and after the session.

• *"Parking Lot"* and *"Issue Bin"* are terms used to identify a location for information that may be tangentially related to a topic under discussion. Their purpose is to ensure that the importance of the information is recognized and the perspectives captured. When an individual or individuals surface information that is related to the topic under discussion, but cannot be discussed or resolved within the current time frame, then the issue may belong in this area.

• The facilitator/instructor (or the learner) writes the issue on a sticky note and posts it to a flip chart (taped to the wall and labeled *"Parking Lot"* or *"Issue Bin'*). This allows the discussion to move forward, yet enables the issue or issues that surfaced to be brought up at a later time for reflection and potential resolution. The results are that participants recognize that they have been heard and the learning-related discussion is not bogged down with information.

TIP: Following lunch is a good time to advise participants on how issues posted in the *"Parking Lot"* or *"Issue Bin"* will be addressed.

Should you find that conversations or discussions are veering off topic, keep in mind the purpose of the session and return to it as your guide. Relate the session's purpose to the participants in order to keep them focused.

Recording Tips

When preparing and using flip charts during a session, recognize that this visual aid is an important tool to assist participants understanding and remembering what has been discussed. It is a good idea to use the flip chart to capture additional group norms and expectations identified when creating a positive group environment. Flip charts can be used to record information during a session, presenting the training agenda, highlight key points of a discussion as it progresses and to draw simple illustrations.

Keep in mind flip charts could also be used when the participants want to post or save what was written as it may be typed up for later use. Flip charts can also be used for brainstorming.

TIP: When you use flip charts (or transparencies), remember to talk to the group and not the flip chart. Other tips for using flip charts include writing legibly, using simple lettering, and alternating marker colors. The number of colors should be limited. Use dark colors to write with and light colors to highlight. It is good practice and expedient to use 2 flip charts and 2 recorders during brainstorming sessions. You can involve participants as recorders.

What to Do When Things* Go *Wrong

Latecomers: Do not wait to open the session. Always start on time. Station someone by the door who will be responsible for handling latecomers.

Abusing break time or *lunch periods:* At the end of breaks, call all participants together. Use a chime or ring a bell. !f some remain in the corridor, have a participant ask them to return so that the session can continue. Try to schedule "less essential" activities right after break in the event of possible latecomers, This might be a good time to check and review "*Parking Lot*" issues.

Testing the Facilitators: Some participants might arrive with "hidden agendas." Such questions as "Why was I told to come?" and "What are your qualifications for training?" are asked when participants feel as qualified as the facilitators to lead. If responding to the participant who is "testing" becomes time consuming, make arrangements to talk with her/him during a break.

Another way of testing the facilitator is engaging in an "intellectual debate." This expends the energy of the facilitator and the group in nonproductive side issues. Ask the challenging participant to continue the discussion at coffee break time or after the session. The facilitator could park the concerns the "*Parking Lot*" and continue with the session.

Facilitators must be aware of the difference between an intellectual debate and working through an issue that involves the entire group.

Another test is the question: "How would you handle this situation ... ?" If it is a real problem and related to the session, it can be addressed by you and the group. If not, put it in the "*Parking Lot*" and arrange to discuss it at another time.

Compile your own list of things that can go wrong and the various alternatives for handling them. During the course of the session, you will use all of your skills in communication, assertiveness, and decision making. This is leadership. You as the facilitator are the leader.

How To Know when You Are Succeeding

Each group is different and each has its own criteria for success. What is successful in one may be a real bomb in another. Sometimes facilitators are seduced into a false confidence when one or two participants say "This is a great workshop." There is at least another 90 percent to hear from, and judging success on the basis of one or two comments invites disaster and disappointment.

TIP: One way to quickly assess how participants are responding to a training session is to do a plus/delta (+/△) review. The delta symbol (△) in math means “change.” Here, delta refers to what might be changed and improved in the training meeting or event. In this process, you ask each participant the following questions:

- What do you think went well?
- What do you think should be changed next time in order to ensure greater success?

At the end of each training module, provide evaluations for each participant to complete and return.

Certain criteria, however, seem to balance emotional and task needs and lead to a more productive learning community:

- The group members attend the workshop voluntarily.
- The group shares a sense of purpose and understands the training objectives.
- Communication channels are open. Learners, as well as facilitators, listen, clarify, and seek understanding.
- Dissent can be expressed without fear of isolation from the group.
- The trainer's words begin to come back through the participants’ communications.
- Suddenly certain things have an effect and are expressed.
- Group members develop an acceptance of different styles of participation.
- The group begins to make its own decisions; its members are accountable to each other.
- Failure in a task or irrelevant questions does not immobilize the group. The group can process and learn from the experience.

- The group is willing to look at itself and give and receive feedback among members. (They may eventually get to a +/△ regarding their participation, thus co-owning responsibility for the outcome along with the facilitators.)
- The group begins to practice the skills presented in the workshop.
- The group is able to function in different roles—total group, subgroup, trios, etc.—and is capable of integrating new members with a minimum amount of disruption.

- Group members begin to exhibit care, concern, and compassion for one another.
- Instead of challenging statements, members begin to seek and provide understanding and support. There is a climate that encourages spontaneity and authenticity.
- Success seems geared to how effectively the group is able to respond to its human needs in a manner that exploits no one and maximizes its own potential,

Reticent Participants

If any group members have appeared reticent to share information or talk during the training, it is important that you connect with them as soon as possible after the training is over, ideally within the next day or so. Don't put them on the spot during the session. There can be a variety of reasons as to why they may have been reticent, such as embarrassment at sharing with others, intimidation by another's dominance, lack of strong opinions or an unwillingness to share an opinion that may be in conflict with others in the group, or differences in learning styles or in the way a participant processes information. A participant may not be contributing because they need time to think about the information they've been given. However, to enhance the synergy of the group's effectiveness explore the thinking of *all* attendees, especially in problem-solving and decision-making matters.

A Few Final Reminders

- Participants have a right to expect some new insights, skills, or information.
- Clarifying expectations of what will/will not be covered at the beginning is important.
- Participants need to learn to apply theory in solving practical problems.
- Theoretical/philosophical discussions from the facilitator's perspective bore participants. Invite participants to talk about how the theories can/do apply in their real-life situations. In doing so you ward off comments like, *"Theory's fine, but let's get down to practical techniques. "*
- Facilitators represent a certain amount of expertise. However, the adults who participate in the session also possess ideas, facts, and opinions, all of which have an experiential basis. Encourage their contributions to minimize hostile comments like, *"You tell us, you're the expert."*
- *"None of this applies to our situation,"* is a common complaint when participants are wearing mental blinders. Participants need to see the relevancy of the topic to their own problems. Help them help each other to explore alternative uses and options, even if they have been tried before. (Adapted from *How To Teach Adults*, Leadership, Pamphlet #5, Adult Education Association of NEA .1975.)

• *"Isn't this wonderful? It's so good for us!"* Enthusiasm and involvement are assets. Becoming ecstatic, however, blinds one to what benefits one should/should not expect from a session. Watch for this in your own behavior as well as in that of the participants.

• *"I'm doing all right* as *I am, why change?"* You'll likely hear this comment during the session because we are asking participants to examine themselves, to become more self-aware. Change is threatening to many, if not most, of us. And since change is a significant aspect of educational work, an open attitude is critical.

Relaxation Activity

This activity is simple as well as impossible to do wrong. Relaxation is a practice in self-observation, in acceptance, in non-judgment, and in self-centering. It is good to do before facilitating a training session. Consider performing this activity to "shift gears" before the training begins.

Directions

1. Sit up straight in the chair with your feet flat on the floor, your arms resting either on the sides of the chair or the tops of your legs, with the palms facing up. Bring your shoulders back so that you feel your rib cage opening, creating space for your lungs to breathe.
2. Close your eyes and bring your awareness to your breath—either in your abdomen, which rises and falls as you breathe, or at the tip of your nostrils where the air enters and leaves your nose. Select the area that is most felt by you. Begin to observe your breathing without changing it.
3. Say quietly to yourself "in" when you inhale and "out" when you exhale. Between breaths, bring your attention to the points where your feet touch the floor, your body touches the chair.
4. Focus all of your attention on your breath. If you find your attention wandering, simply bring it back gently to your breathing and continue with saying "in" on the inhalation and "out" on the exhalation.
5. Acknowledge any sensations in your body and gently return your attention to your breathing. Do the same with any emotions or feelings that may occur.
6. Continue focusing your attention on your breath for 15 to 20 minutes, depending on the time available to you.
7. Open your eyes and return to your surroundings.