Promoting Meaningful Learning for Impact

The Facilitator’s Guide to Learning Events

October 2019

KAMPALA, UGANDA
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Making Learning Work for Your Organisation

Globally, the concept of “learning” has become an integral part of the work that many of us do today. We have moved beyond simply organising workshops towards creating more systematic and well-thought-out series of training that are aimed at propelling participation, partnerships and personal buy-ins into processes. This is what we will call the “P” process throughout this guide.

We believe that learning is individual; it is about people, it is about personal experiences, and it is about listening to and appreciating other perspectives if we are to make progress and create meaningful social transformation in Africa. We are at the crossroads of development where we need to understand why, despite varied government and NGO interventions, there has been little progress in terms of development.

At Impact and Innovation Development Centre (IIDC), we take a learning-centred approach towards ensuring meaningful impact and lasting social transformation. We encourage evidence-based learning, sharing and reflection. This intentional approach towards learning is informed by developments both in Africa and beyond, in terms of questioning existing models of social change that have not necessarily translated into progress for many of our continent’s vulnerable communities.

As a team we have taken a critical approach towards learning by asking ourselves what learning actually means. Drawing from our rich culture, we understand that learning has been an integral component of our traditions for a long time. In Kiswahili, they say “Mto ulikunjama, sababu ulikosa mtu wa kuungoza” (translation: “The river meanders, because it did not have a guide”). Indeed, our diverse experiences remind us that learning, knowledge and experience cannot be undermined.

As a facilitator, you will be expected to guide conversations based on the expected learning outcomes, build consensus and ensure that there will be an agreed feedback system. This guide has been designed for you to make that unique difference between simply conducting a workshop and developing a learning approach that will help you achieve a more meaningful event that will contribute to social transformation.

We hope that this Facilitator Guide hooks your curiosity, challenges you, elicits conversations and helps you create invigorating sessions and make a difference in the development world – may it inspire! It starts with you.

Thank you,

Deogratias Yiga (IIDC)

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1 http://swahiliproverbs.afrst.illinois.edu/learning.html
Overview

According to the Oxford English Dictionary, learning is defined as “The acquisition of knowledge or skills through study, experience, or being taught”\(^2\). In his paper, The Learning NGO Bruce Britton (1998) states,

“A strong case has been established for the importance of learning as a means of improving organizational effectiveness even against the background of considerable change and unpredictability. The concept of the ‘learning organisation’ has become shorthand for an organisation which is ‘skilled at creating, acquiring, and transferring knowledge, and at modifying its behaviour to reflect new knowledge and insights’ (Garvin 1993)\(^3\).

Organisations such as Global Learning Partners (www.globallearningpartners.com) have taken a transformative approach to project and programme design by incorporating learning and dialogue into their work with professionals and organisations across the globe. The THNK School of Creative Leadership (www.thnk.org) in the Netherlands has taken a multi-pronged approach by adopting design and business-thinking in order to encourage leaders to incorporate learning in their work. In Africa several organisations have embraced learning particularly over the past five years. This Facilitator Guide takes into account the importance of dialogue and provides tips to ensure that learning actually happens so we increase the possibility of real change.

Why Learning Matters

While monitoring and evaluation are key components of development programmes, organisations are increasingly beginning to understand the importance of incorporating “learning and development” into their work. That said, some organisations and projects remain unwilling to go beyond monitoring and evaluation. Field reports and data collected are not necessarily being used to elicit learning, probe progress and redesign initiatives to ensure that the programmes are still fit-for-purpose. Some organisations have also not been able to integrate learning into their work because of limited staff, tight funding sources, and varying donor demands. Additionally, other NGOs are unwilling to challenge the status quo and would rather continue with business-as-usual.

Research shows that incorporating learning and the application of those learnings into initiatives is a prerequisite for meaningful change. Learning takes place at personal, project, and institutional levels. This is why linking learning to practice, and actionable change is essential if organisations are to achieve sustained transformation.

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\(^2\) https://en.oxforddictionaries.com/definition/learning

\(^3\) https://www.imainternational.com/images/listing_doc/OPS-17-The-Learning-NGO%20%208%20Britton%201993.pdf
Furthermore, learning gives more agency and voice to organisations and their stakeholders because of the collaborative approach and willingness to improve interventions. Specifically, learning has manifold benefits if it is well designed and integrated into a project.

As the diagram below shows, learning is cyclical, giving room for organisations to identify new ideas, clearly define and engage their stakeholders, identify diverse partners, develop new products, document their processes and impact, foster team cohesion, and create more meaningful programmes.
Integrating Learning into Practice

As organisations and projects grow, the value of incorporating learning into new and existing interventions cannot be underestimated. Research shows that organisations with a learning culture have stronger sense of purpose and shared value. Indeed, it is important to align learning objectives with organizational goals in a participatory and evidence-based manner. Learning events need to have goals that are succinct, clear, and measurable (SMART).

In developing a learning event, the following questions are pertinent:

- Are we on track? What is working? What is not working?
- Where do we need to improve?
- What is the value of the key learnings to our organization?
- What are the new ideas that we can collectively adopt?
- With whom else do we need to share our learnings? How should we do this?
- How do we incorporate our lessons into our existing theories of change?
- How do we achieve our common goal using different pathways?

Key Learning Platforms

- 30-50 minutes
- Technology-based
- Chat rooms discussions
- Facilitated conversations
- Customised one-on-one coaching (face-to-face or via Zoom, Skype or WhatsApp)
- Written feedback
- Interviews with others
- Facilitated dialogue
- Empathy
- Critical thinking
- Clear action planning
- Observation
- Big group
- Networking & collaborative approach
- Group work
- Expert-led dialogue
Your Role as Learning Facilitator

Preparing for the Learning Event – 5C’s

As a learning facilitator, it is critical to consider the following 5C’s.

- **Content:** Carry out primary and secondary research. Understand your subject matter. Questions to ask: Is it relevant? Is it new? Is it evidence-based? Is it challenging? Will it help transform the organization/project?

- **Co-create:** Collaborate with your team to develop a fluid agenda with a clear sense of purpose and direction. An agenda needs to be as simple and straightforward as possible. See Appendix B: “Sample Agenda”

- **Connect:** You will need to understand who it is that you are working with, what it is that you are working on and what their learning needs are. This will help you develop a clear concept note. See Appendix A: “Sample Concept Note”

- **Compelling Case for Action:** Develop a concise and consistent strategy that gives agency and motivates potential audiences to participate actively in a learning event.

- **Creativity:** Learning needs to be personal and challenging. It is imperative therefore you identify opportunities that will help participants and organisers achieve the objectives of the learning event.
Facilitating the Learning Process – 6P’s

Learning-centred approach focused on the learning needed to change the situation of people coming to an event or the people they work with. To do this, we need to understand the people coming and their situation. The following 6P’s help ensure the people are central to our pre-and post-work, as well as what we do during the event itself.

- **Preparation:** As outlined in the previous section, preparation is critical. The more you know about the people coming, their situation, the needs and challenges, the hoped-for change, the time you have and the place you are going, the more successful the learning event will be.
  → **Appendix C:** “A Checklist”
  → **Appendix D:** “A Checklist (Quick Overview)”
  → **Appendix Q:** “8 Steps of Design”
  → **Appendix B:** “A Sample Agenda”

- **Persuasion:** Whatever platform you are using, it is important to get your participant’s buy-in, to give them the space to engage with the topics and with others. This entails a lot of respect, listening, and negotiation.
  → **Appendix E:** “5 Things to Keep in Mind”
  → **Appendix F:** “6 Core Principles (Model)”
  → **Appendix G:** “6 Core Principles (Tool)”
  → **Appendix H:** “Teaching Holistically (Model)”
  → **Appendix I:** “Teaching Holistically (Tool)”

As well, teaching to the whole person will deepen dialogue and learning, which will ensure participants see the value of what they are learning.
• **Progress:** It is essential that you constantly and consistently remind participants what the objectives of the event are. This will also help increase participation and steer the conversations in the right place. These objectives should be placed either on flip charts, posters or on a PowerPoint presentation. Each session should have clear objectives that contribute to the over-riding learning event goals. Invite participants to ask questions, and check-in with them on the progress of the event.

It is important to review the mood of your participants as it may impede the learning process. The next section outlines a standard learning agenda.

Also, it is helpful to ensure your learning event begins with, and ends with clear learning outcomes.

• **Perspectives:** As a facilitator, it is important to be empathetic, to listen, to invite different voices, to invite diverse views and to encourage as much interaction as possible. Guiding questions need to be framed in a respectful and solution-oriented manner.

    → **Appendix J:** “Guiding Questions”
    → **Appendix K:** “4 Types of Questions (Model)”
    → **Appendix L:** “4 Types of Questions (Tool)”
    → **Appendix M:** “Tips for Effective Facilitation”
    → **Appendix N:** “Tips for Getting Quick Feedback”

• **Participation:** For a learning session to be participatory, ideally each participant should be actively involved or given an opportunity to share personal views. As a facilitator, you should pay special attention to the introverts and create platforms for them to freely express their views.

    → **Appendix O:** “Techniques to Try”
    → **Appendix P:** “World Café”

**Learning Outcomes**

A learning event is different from any other meeting because it has been deliberately designed to create a shared sense of purpose, to promote reflection and to define a clearer way forward. In this regard, it is important to ask the following questions to help the participants commit to the agreed action plan.

• **Individual Questions:**

    → How do you individually feel about the learning event?
    → What is your key take away?
    → How will you add value to the agreed plan of action?
    → What support would you require in order to increase your capacity to carry through with the agreed learning outcomes?
• **Organisational Questions:**
  → What is your strategy to sustain the momentum to elicit and incorporate learning into your work?
  → How will you share the results of this and future learning opportunities?
  → Whom else do you need onboard to ensure that the learning strategy is adopted and sustained?
  → What will you need to develop in order to be successful?

**Resources**

- *Global Learning Partners (GLP)* -
  [www.globallearningpartners.com/resources/shareable-resources](http://www.globallearningpartners.com/resources/shareable-resources)

- *Overseas Development Institute (ODI)* –
  [www.odi.org](http://www.odi.org)

- *The Communication Initiative Network* -
  [www.comminit.com](http://www.comminit.com)
APPENDICIES

Appendix A: Preparation – A Sample Concept Note

(3 Page Maximum)

- Front Cover
  → Title (simple and concise)
  → Abstract: This concept note outlines a proposed learning event. It is presented for comments and review by senior management.
  → Name/organisation
  → Date/place

- Context
  → What is the background (social, economic, financial etc)

- Rationale for the Proposed Learning Event
  → What problem will this event help address and why this approach?

- Objectives
  → 3 clear objectives on knowledge, skill and expertise. (Remember that learning is a two-way process).

- Proposed Participants: Identify who, why and when

- Identify 3 to 4 guiding questions for the learning event


- Expected Results
  → Define 3 learning outcomes as a result of the learning process
## Appendix B: Preparation – A Sample Agenda (3 Days)

### DAY 1: The Context and Why Learning Matters

*By the end of DAY 1, participants should be expected to understand emergent issues and have shared their personal/professional challenges.*

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Methodology</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 min.</td>
<td>Welcome remarks</td>
<td>Personal motivation and appeal for the need to “Learn” in order to “Improve.”</td>
<td>“Learning event” owner</td>
</tr>
<tr>
<td>40 min.</td>
<td>SESSION 1: Introductions &amp; expectations</td>
<td>Interactive (action-learning approach)</td>
<td>Facilitator</td>
</tr>
<tr>
<td></td>
<td>2 questions that help create a learning atmosphere for participants and define the purpose of the meeting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comfort Break – 30 min.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>120 min.</td>
<td>SESSION 2: Setting the context on why learning matters &amp; the theoretical framework (models of a specific strategy)</td>
<td>Video, presentations, panel discussion, group work, Q &amp; A</td>
<td></td>
</tr>
<tr>
<td>Lunch – 60 min.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>60 min.</td>
<td>SESSION 2 (cont.): Team-exercise to build connections and create empathy amongst participants</td>
<td>Interactive – leading to the conversation on the next session</td>
<td></td>
</tr>
<tr>
<td>Comfort Break – 15 min.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>120 min.</td>
<td>SESSION 3: Topic or case-study specific</td>
<td>Participant-led</td>
<td>Facilitator</td>
</tr>
<tr>
<td>30 min.</td>
<td>SESSION 3 (cont.): Review of DAY 1</td>
<td>Interactive</td>
<td>Facilitator</td>
</tr>
</tbody>
</table>
# DAY 2: Moving the Learning Conversation Forward

Day 2 is designed to encourage participants to begin to identify solutions based on evidence.

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Methodology</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>120 min.</td>
<td>SESSION 4: Solutions and best practices</td>
<td>Change seating of room</td>
<td>Facilitator</td>
</tr>
<tr>
<td></td>
<td><strong>Comfort Break – 30 min.</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90 min.</td>
<td>SESSION 5: Best practices and theory</td>
<td>Video, presentations, panel discussion &amp; group work Q &amp; A</td>
<td>Participant and expert-led</td>
</tr>
<tr>
<td></td>
<td><strong>Lunch – 60 min.</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Four hours, with a break</td>
<td>SESSION 6: Field Trip Questions:</td>
<td>Observation, field notes, individual reflection, group discussions after the field trip.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• What is unique about this learning event?</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• What would I improve?</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• What are the points of conflict and how can we resolve them?</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>• How do we bring them all together and find a common plan of action?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### DAY 3: Connecting, Creating and Consolidating - Paving the Way Forward
*By the end of DAY 3, participants have developed a shared vision.*

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Methodology</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 min.</td>
<td>SESSION 8: Reflections on the past two days – emerging lessons &amp; opportunities</td>
<td>Individual reflection, groups of 2 presentations</td>
<td>Facilitator</td>
</tr>
<tr>
<td>120 min.</td>
<td>SESSION 9: Identifying points of connection and leveraging the power of partnerships.</td>
<td>World Café, discussions and dialogue walks</td>
<td>Facilitator</td>
</tr>
<tr>
<td></td>
<td>Comfort Break – 15 min.</td>
<td></td>
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<tr>
<td>60 min.</td>
<td>Team-exercise (outside the room)</td>
<td>Interactive – leading to the session on joint action plans and commitments to outcomes</td>
<td>Facilitator</td>
</tr>
<tr>
<td></td>
<td>SESSION 11: Bringing it all together: Commitments</td>
<td>Group (each organization or interest group work on their own)</td>
<td>Facilitator</td>
</tr>
<tr>
<td></td>
<td>SESSION 12: Sharing and supporting our learning commitments</td>
<td>Creative feedback (mimes, music, dance)</td>
<td>Facilitator and participant-led</td>
</tr>
<tr>
<td></td>
<td>SESSION 13: Concretising action plans – Who does what?</td>
<td>Matrix on PowerPoint or word that is projected in the room, seen, and signed by all</td>
<td>“Learning event” owner</td>
</tr>
<tr>
<td></td>
<td>SESSION 13: Closing reflection</td>
<td>Individual reflections – everyone is invited to join and share their personal and professional perspectives</td>
<td>Facilitator and “Learning event” owner</td>
</tr>
</tbody>
</table>
Appendix C: Preparation – A Checklist (for Entire Event)

**Six Months**

- Develop a concept paper and proposal
- Agree on a learning platform
- Develop the title and tagline
- Identify and engage participants, resource persons, and speakers
- Identify venue and logistics
- Ensure the right technology is available and clear instructions have been communicated to participants (if it is a webinar)
- Send concept note and invitation letters to all participants
- Begin travel plans for participants (if it is a workshop/learning convening)

**Five Months**

- Call or email each participant and speakers to ensure they have received their invitations
- Purchase materials and begin preparations for the event

**Four Months**

- Develop a participant’s list with a bio, including social media links
- Follow up with the venue to ensure that everything is in place – ensure that all payments have been made

**Three Months**

- Develop evaluation forms
- Re-check the agenda and reading material to ensure that they are still relevant
- Send agenda, readings, logistics information, dietary restrictions, cultural requests, and other necessary information to participants
- Prepare the learning questions for each session
- Develop a social media plan (if this is a big convening or an online event)

**Two Months**

- Prepare activities that will promote the learning process
- Develop the Learning Booklet with key messages from the organisers, and with the learning questions
- Send the presentation guidelines to each speaker, including content, time, methodology

**One Month**

- Print table tents, name badges, and other collateral
- Confirm final details and agenda with the venue
- Request speakers for their presentations

**Day of Event**

- Ensure all logistics, including meals, rooms, transport are on track
- Make sure set-up of venue is conducive for learning and that there is enough coloured paper and markers for participants
- Setup and test DVD player and/or computer and sound system for videos to be played
- Set out table tents on tables (ensuring an even distribution of men/women, people of similar backgrounds, etc.)
- Change the seating arrangement throughout the event
**MORNING**
- □ Arrive early and ensure that the venue is properly set
- □ Make announcements about the day’s activities and any expectations about learning event i.e. where/when messages will be delivered, rules about mobile phones, where to direct questions, etc.
- □ Ensure that all your participants are in the room are comfortable with their name badges and have been introduced to each other properly

**DURING EVENT**
- □ Review the agenda with the co-organisers to assess the temperature and revise times accordingly
- □ Check on all your participants individually to make sure they are comfortable with the process, progress and other participants
- □ Invite participants to give you feedback
- □ Post a list of departure times for transportation in the seminar room

**AFTER THE EVENT**
- □ Summarize post-events evaluations and share with participants
- □ Write learning event report
- □ Send thank you notes and updates as needed to guests, scholarship sponsors, funders etc.
## Appendix D: Preparation – A Checklist (Quick Overview)

<table>
<thead>
<tr>
<th>Item</th>
<th>Status</th>
<th>Responsible</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speakers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agenda</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presentations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Logistics</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Report</td>
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</tbody>
</table>
Appendix E: Persuasion – 5 Things to Keep in Mind

Whatever platform you are using, it is important to get your participant’s buy-in, to give them the space to engage with the topics and with others. The model below offers five things to keep in mind.

- **RESPECT**: Remember we are all individuals. Give your participants an opportunity to feel like their values and experiences are being listened to and taken on board.
- **LISTEN**: Pay attention to both the said, and the unsaid words. A question to be asked could be “If I am understand correctly, are you saying”, or “As you were saying…..”
- **REFLECT**: Take the opportunity to dig deeper and ask your participants what this really means to them individually, as teams and as organisations.
- **INVITE**: Open up space for your participants to share their views, express their opinions and challenge each other. Safety is important.
- **ASK**: Probe, delve and challenge in a respectful manner.
Appendix F: Persuasion – 6 Core Principles (Model)

6 Core Principles of Adult Learning

According to this model⁴, six core principles can help or hinder learning – depending if they are attended to or not. It is the responsibility of the designer and the facilitator to ensure these are present before, during and after a training. When these principles are well attended to learning is maximized and real impact is more possible. When any of these principles is lost at any given time, the other principles are also in jeopardy, and learning may by compromised.

Consider:

- How can you start to ensure the six core principles before a training?
- How can you attend to these during a training?
- How does using a learning-centred approach help ensure these six core principles are well attended to?
- Which of these principles to I tend to overlook or pay less attention to? What will I do about this?

⁴ Used with permission from Global Learning Partners www.globallearningpartners.com
**Appendix G: Persuasion – 6 Core Principles (Tool)**

This tool is used with permission from Global Learning Partners [www.globallearningpartners.com](http://www.globallearningpartners.com)

**What did you do to ensure each of the 6 core principles of learning?**

<table>
<thead>
<tr>
<th></th>
<th>What did/will you do?</th>
<th>What can you do more or less of?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Respect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engagement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relevance</td>
<td></td>
<td></td>
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<tr>
<td>Inclusion</td>
<td></td>
<td></td>
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<tr>
<td>Immediacy</td>
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</tr>
</tbody>
</table>
Appendix H: Persuasion – Teaching Holistically (Model)

According to this model\(^5\), Benjamin Bloom described three overlapping types of learning:

- **Cognitive domain**: Knowledge or head learning
- **Affective domain**: Attitudes/beliefs or heart learning
- **Psychomotor domain**: Skills or body learning

Teaching holistically requires more than the study of ideas and the sharing of information (cognitive). It also involves how we feel (affective) about the ideas and concepts we are learning and learning skills we need (psychomotor) to be able to use those ideas. For learners to change something in their work or lives, they need the key information, the skills to do it, and the conviction that it is important to do – they need to know WHAT something is, HOW to use it, and WHY it is important.

\(^5\) Used with permission from Global Learning Partners [www.globallearningpartners.com](http://www.globallearningpartners.com)
Appendix I: Persuasion – Teaching Holistically (Tool)

How can you use this tool to strengthen your work?

This tool is as described below:

### Teaching to the HEAD – Teaching WHAT something is

<table>
<thead>
<tr>
<th>Needs Assessment</th>
<th>Design</th>
<th>Facilitation</th>
<th>Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did you check what the learners want or need at this time?</td>
<td>Did you design to teach facts, methods, theories, concepts, or information?</td>
<td>Did you present the content clearly?</td>
<td>How do you know they know this content, and WHAT it is?</td>
</tr>
<tr>
<td>Did you check what stakeholders believe is needed at this time?</td>
<td>Did you give them the new content to take home with them?</td>
<td>Did the learners engage with the new knowledge in a meaningful way?</td>
<td>Did you check what they think about this new content?</td>
</tr>
</tbody>
</table>

### Teaching to the BODY – Teaching HOW to do something

<table>
<thead>
<tr>
<th>Needs Assessment</th>
<th>Design</th>
<th>Facilitation</th>
<th>Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did you check to see if they know how to do something?</td>
<td>Did you design to show them how to do something?</td>
<td>Did the learners practice or try out the new skill?</td>
<td>How do you know they know HOW to do the new skill?</td>
</tr>
<tr>
<td>Did you check what they need or want to learn how to do?</td>
<td>Did you offer a step-by-step process for how to do something?</td>
<td>Did they get feedback on what skill they are learning?</td>
<td>Do the learners have a plan for using the new skill they just learned?</td>
</tr>
</tbody>
</table>

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6 Used with permission from Global Learning Partners [www.globallearningpartners.com](http://www.globallearningpartners.com)
Teaching to the HEART – Teaching WHY something is important

**Needs Assessment**
- Did you check how learners feel about the content to be taught?
- Did you check what challenges/obstacles are facing these learners?

**Design**
- What did you do to engage the heart?
- How did you invite stories into the learning to help the heart feel the importance of this content and engage personally?

**Facilitation**
- How did you ensure a safe space for heart learning?
- Did you check how they feel about this new content?

**Evaluation**
- How do you know they know WHY this content is important in their life/work?
- What evidence do you have that they value this in their life?

**General Check In**
- Did you intentionally decide which learning domain was needed at this time with these people, considering the time available? What is your focus?
- Why did you decide to focus the way you did?
- Did you clarify with the learners what your focus was going to be, and why? When/how did you do this?
- Did you clarify with the stakeholders what your focus was going to be, and why? When/how did you do this?
- Is more learning needed in a particular learning domain? What is it? When will you teach this?

**NOTE:** Not we don’t need to teach in each learning domain every time we teach. It is our responsibility to learn and then decide where the priority focus should be at this time. Do they need to know WHAT something is, HOW to do it, or WHY it is important for them?
## Appendix J: Perspectives – Guiding Questions

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Helpful Questions</th>
</tr>
</thead>
</table>
| CONTENT             | • You have extensive experience in…what do you think we can do to improve?  
• How do you think we can learn from this topic/challenge/issue?  
• I would like to hear from you on…  
• Based on your experience, how do you think we can adopt this way?  
• How can we incorporate these lessons into our existing operations?  
• How has this learning influenced the intervention?  
• What are we going to continue, amplify, stop doing etc.?  
• How can we deepen authentic dialogue with our partners? |
| PROCESS             | • Do you feel like we are taking the right direction?  
• Is this conversation helping us achieve our objective?  
• What more can we do to ensure that we keep to the topic?  
• I heard you saying something that is pertinent to this event, would you like to expound on it?  
• Are we on the right path?  
• Has the situation, or your understanding, changed from previous planning sessions? |
| BEGINNINGS & ENDINGS| • What is our vision and how do we use this event to rethink our vision?  
• What will it look like when we are being successful?  
• How can we make the most of this event?  
• What do you think is key?  
• Have we done what we were supposed to do?  
• What have we learnt?  
• Did we achieve the goals we set?  
• What have we learnt? |
Appendix K: Perspectives – Types of Questions (Model)

A model\(^7\) of the questions is as follows:

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Possible Questions</th>
</tr>
</thead>
</table>
| **CLOSED Questions**    | • Usually yes/no answers  
                          | • Don’t invite dialogue  
                          | • Often used to check something  
                          | • Have a function and are often a great way to poll a group |
| **OPEN Questions**      | • Answers are unpredictable  
                          | • You ask with genuine curiosity to understand or learn something  
                          | • You ask ready to take the time to listen  
                          | • Often used to invite meaningful dialogue with groups  
                          | • Wise to list these in the learning design itself so you can remember what you wanted groups to engage around AND is a visual tool for learners or those entering into dialogue  
                          | • Invite dialogue |
| **DIGGING DEEPER Questions** | • Used to push dialogue and thinking to a deeper level  
                          | • Help to get more clarity or information about something being shared  
                          | • Usually used by facilitator and not in the learning design or on table  
                          | • They are a helpful facilitation skill to push/deepen thinking, sharing, or reflection |
| **POWERFUL OPEN Questions** | • There are no easy answers  
                          | • They are usually personal and complex  
                          | • They point to or invite thinking about the desired change or impact as a result of the learning or learning event i.e. it is easy to name change you want but what is needed to get there  
                          | • These are questions that have people pause to reflect what they could say |

\(^7\) Used with permission from Global Learning Partners [www.globallearningpartners.com](http://www.globallearningpartners.com)
Appendix L: Perspectives – Types of Questions (Tool)

A tool\(^8\) that determines the types of questions asked is as follows:

How and where did you use each of these types of questions, and what was the impact?

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Possible Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLOSED Questions</td>
<td></td>
</tr>
<tr>
<td>OPEN Questions</td>
<td></td>
</tr>
<tr>
<td>DIGGING DEEPER Questions</td>
<td></td>
</tr>
<tr>
<td>POWERFUL OPEN Questions</td>
<td></td>
</tr>
</tbody>
</table>

\(^8\) Used with permission from Global Learning Partners [www.globallearningpartners.com](http://www.globallearningpartners.com)
Appendix M: Perspectives – Tips for Effective Facilitating

A learning facilitator plays a big role in moderating meaningful dialogue and ensuring learning. The table below provides some tips for effective facilitation.

<table>
<thead>
<tr>
<th>DO</th>
<th>DO NOT</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Listen with curiosity to understand</td>
<td>• Assume that everyone understands the purpose of the learning event</td>
</tr>
<tr>
<td>• Respect each person’s opinion</td>
<td>• Dominate the conversation</td>
</tr>
<tr>
<td>• Keep careful time</td>
<td>• Steer people too fast towards a decision</td>
</tr>
<tr>
<td>• Ask respectfully</td>
<td>• Interrupt</td>
</tr>
<tr>
<td>• Bear in mind cultural, religious, and social sensitivities</td>
<td>• Shout at participants</td>
</tr>
<tr>
<td>• Use appropriate action and gestures</td>
<td>• Walk out of the room infrequently</td>
</tr>
<tr>
<td>• Read the room constantly because participants are unique</td>
<td>• Micro-manage participants.</td>
</tr>
<tr>
<td>• Check-in with your participants on process and progress</td>
<td>• Use acronyms</td>
</tr>
<tr>
<td>• Maintain a steady base and guide participants towards the objectives</td>
<td>• Use a condescending tone when dealing with difficult participants.</td>
</tr>
<tr>
<td>• Moderate participants to ensure that everyone has the opportunity to share their experiences</td>
<td>• Act too meek</td>
</tr>
<tr>
<td>• Ask how you can help participants reach a consensus</td>
<td>• Check your phone.</td>
</tr>
<tr>
<td>• Ask for feedback on how your facilitation and what you can change</td>
<td>• Use appropriate humour</td>
</tr>
<tr>
<td>• Encourage vulnerability</td>
<td>• Apologise when you make a mistake.</td>
</tr>
<tr>
<td>• Use appropriate humour</td>
<td>• Micro-manage participants.</td>
</tr>
<tr>
<td>• Encourage vulnerability</td>
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</tr>
<tr>
<td>• Apologise when you make a mistake.</td>
<td>• Act too meek</td>
</tr>
<tr>
<td></td>
<td>• Check your phone.</td>
</tr>
</tbody>
</table>
Appendix N: Perspectives – Tips for Getting Quick Feedback

It is important to get feedback from the group to hear what they think of the content they are learning and how they are learning it. Here are some ideas for doing this that do not take much time. For each of these, you only need to hear a few responses.

- **How Do I Feel?**
  “Take a minute on your own to think about how you feel right now…. In the large group, shout out the word or phrase that expresses how you feel about the session today.”

- **What Was New?**
  “In the large group, let’s take a minute to hear something that was new for you today.”

- **What Worries You?**
  “In the large group, let’s take a minute to hear something that worries you about what you heard today.”

- **What Surprises You?**
  “In the large group, let’s take a minute to hear something that was surprising or worrying to you today.”

- **Your Questions**
  “At this point in our program, what 1 question do you hope gets answered before we finish?”

- **What Bothers You?**
  “After all we learned today, what do you think is most misunderstood in your country? Or, your community?”

- **I Want More**
  “After today’s session, what do you want to learn more about?”

- **Your Session**
  “What went well for you today for you?” and, “What suggestions do you have to our next session that would help your learning?”

- **Check Energy**
  “Let’s rate our energy at this point in time by rating it on our fingers: From 1-10 what is your energy?” (At the same time, everyone should hold up their 2 hands to show their number)

- **Checking in Privately**
  Sometimes it is helpful to check in during a break by asking, “How is the course working for you so far?”

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9 Used with permission from Global Learning Partners [www.globalearningpartners.com](http://www.globalearningpartners.com)
Appendix O: Participation – Techniques to Try

The following interactive formats help sustain the energy, create team cohesion, and promote personal reflection and learning.

- **Individual Reflection:** This powerful opportunity gives participants a chance to connect with them and with the content. It is usually based on one or 2 questions such as “What is my learning from this? This can be done at the beginning and end of the Learning Event.

- **Buzz Groups:** “A buzz group is a small, intense discussion group usually involving 2 to 3 persons responding to a specific question or in search of very precise information. The full plenary group is subdivided into the small groups. It’s called a ‘buzz’ group because it mimics the sound of people in intense discussion”[10]

- **Panel Group Discussions:** “A panel discussion is a specific format used in a meeting, conference or convention. It is a live or virtual discussion about a specific topic amongst a selected group of panellists who share differing perspectives in front of a large audience. The panel is typically facilitated by a “moderator” who guides the panel and the audience through the event. The panel, typically 3-4 experts or practitioners in the field, shares facts, offers opinions and responds to audience questions either through questions curated by the moderator or taken from the audience directly. The panel session typically lasts for 60-90 minutes”[11]. It is important to inform and invite the speakers to meet beforehand and ensure that there is clarity on roles and responsibilities. Appoint a chair or ensure that you clearly facilitate these sessions. Keep time and direct the conversations in a manner that will keep the rest of the audience engaged. This format works best when the topic is technical that requires dialogue on best practices.

- **Team Building Exercises:** These exercises can be done in both the room or outside. It can also be done online, where participants are invited to connect with each other through music, dance, art, drama, and images. “Team building activities and games are supposed to be not only educational, but also enjoyable. They help the team learn about each other — how each person thinks, works, solves problems, and has fun”[12].

- **Dialogue Walks:** This method promotes individual reflection, listening, and sharing. Invite participants to choose a person that they do not know. Ask them to take a walk for 20 minutes to listen to each other. Encourage them to ask each other how they feel about their work, and how this learning event will help them. They do not need to report on what was said but are encouraged to say how the exercise helped them feel.

- **The Learning Gallery:** This tool helps participants visualize the learning process. As facilitator, you will need place flip charts and posters from previous sessions on one wall and invite participants to take a walk, and then invite them to reflect on the outcomes of discussions.

- **World Café:** World Café is a technique for brainstorming and collecting many ideas about a topic. You can use it anytime and is especially helpful with large groups i.e. conferences.

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[10] [www.kstoolkit.org/buzz-groups](http://www.kstoolkit.org/buzz-groups)
[11] [www.powerfulpanels.com/definition-panel-discussion](http://www.powerfulpanels.com/definition-panel-discussion)
[12] [www.wrike.com/blog/team-building-games](http://www.wrike.com/blog/team-building-games)
Appendix P: Participation – World Café

World Café is a technique for brainstorming and collecting many ideas about a topic. You can use it anytime and is especially helpful with large groups i.e. conferences. Here is a description of how to use it, as shared by www.WorldCafe.com

- **SETTING:** Create a “special” environment, most often modelled after a café, i.e. small round tables covered with a checked or white linen tablecloth, butcher block paper, coloured pens, a vase of flowers, and optional “talking stick” item. There should be four chairs at each table (optimally) – and no more than five.

- **WELCOME & INTRODUCTION:** The host begins with a warm welcome and an introduction to the World Café process, setting the context, sharing the Cafe Etiquette, and putting participants at ease.

- **SMALL GROUP ROUNDS:** The process begins with the first of three or more twenty-minute rounds of conversation for the small group seated around a table. At the end of the twenty minutes, each member of the group moves to a different new table. They may or may not choose to leave one person as the “table host” for the next round, who welcomes the next group and briefly fills them in on what happened in the previous round.

- **QUESTIONS:** each round is prefaced with a question specially crafted for the specific context and desired purpose of the World Café. The same questions can be used for more than one round, or they can be built upon each other to focus the conversation or guide its direction.

- **HARVEST:** After the small groups (and/or in between rounds, as needed), individuals are invited to share insights or other results from their conversations with the rest of the large group. These results are reflected visually in a variety of ways, most often using graphic recording in the front of the room.  

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13 www.theworldcafe.com/key-concepts-resources/world-cafe-method
This model\textsuperscript{14} demands that we approach our design work from the perspective of the learners, their current situation and the positive impact we are working toward.

- We fill in this framework through a circular process by drafting steps and then revising them as other steps are understood.
- We use this framework to identify what we know and what we need to know to develop the right learning program for the people coming.
- This framework helps us check our assumptions and reminds us to check elements that may impact the learning or the learners.

\textsuperscript{14} Used with permission from Global Learning Partners \url{www.globallearningpartners.com}
Appendix R: Participation – Questions to Ask

Assess the relevance and contribution of each participant to the process by asking yourself the following questions:

• Who are they?
• What is their experience?
• What is their value addition to the learning process? Why is their contribution important?
• What do they add towards building institutional knowledge?
• Why do they need to be a part of this learning event?
• What is their key challenge and how will this event help them improve or enhance an existing resource?
• How can we encourage them to participate actively?

Also, do the following:

• Research and understand who your participants are by asking their colleagues, using LinkedIn and other social media tools.
• Try to get to know each individual’s motivation, values, and challenges. This helps create a persuasive and personal approach to a learning event.
• Try to remember their first names.
• Participants are different; some are extroverts while others are introverts. Some prefer not to participate in plenary discussions, leaving others to dominate conversations. Observe and moderate the conversations to ensure that everyone feels respected and included in the learning process.