Reflect

Training of Trainers (TOT)

Guidelines for Practitioners

Reflect Learning Cycle and Process

Adapted from material developed by Sonja Labuschagne

NOTE:
The illustration should be read clockwise. Note that there are no lines or arrows between the different components, because it represents an integrated learning process, and although it is often used in a specific sequence, nothing prohibits the facilitator and participants to use a different sequence, e.g. introduce supplementary materials earlier in the process.

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Training of Trainers (TOT)

Guidelines for Practitioners

Developed by
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South Africa Reflect Network

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Permissions

Contents

This publication is dedicated
to the memory of Frank Magagula of the
Emakhazeni Community who worked tirelessly
as a *Reflect* facilitator and advocated for the
rights of poor and excluded people.

FOREWORD

Since 1999, *dvv international* has been actively involved in supporting *Reflect* in South Africa. *Reflect*, an innovative approach to literacy and community empowerment, is much more than the simple transferring of cognitive skills such as reading, writing and numeracy. It is about empowering participants with critical and analytical skills needed for sustainable and equitable development. *Reflect* demands a cadre of accomplished facilitators who are able to guide a structured participatory learning process that is empowering for all those involved.

However, the South African context has been characterised by a dearth of skilled trainers who are able to prepare *Reflect* facilitators for their roles and responsibilities. This has been one of the bottlenecks hindering the roll-out of *Reflect* circles and activities in the region. It has become vital that this issue be addressed so that we can meet the growing demand from *Reflect* practitioners and affiliates around the country.

One of the ways which *dvv international* has identified to overcome this problem is to grow the number of trainers with whom our partner SARN has been working. These efforts have resulted in a growing foundation of knowledge which has supported the development of the necessary ingredients for a Training of Trainers (TOT) course. The systematisation and collation of this collective experience and learning have been crystallised in the present TOT Guidelines. It was put together by Dr. Gillian Attwood, a member of the SARN board, who has extensive experience in *Reflect* practices. A draft form of this manual was tried out during a TOT course organised by SARN in 2007. This draft has benefited from the manifold inputs of members of the SARN network, as well as facilitators and trainers.

*dvv internationa*l hopes that these guidelines will contribute to further strengthening the network of best *Reflect* practice in South Africa and in the region. Without doubt, these guidelines are a "work in progress" and will see improvements over the years, together with the growth of *Reflect* practices in the region.

We thank all facilitators, trainers, critical readers and concept authors for their efforts and contributions and hope that these guidelines will be one milestone on a longer road to powerful participatory adult learning practices.

Wolfgang Leumer
Regional Representative Southern Africa
dvv international

Training of Facilitators
(TOF) guide

WELCOME to the *Reflect* Training of Trainers (TOT) guide. This document offers guidelines to *Reflect* practitioners interested in strengthening their knowledge and skills towards becoming more effective participatory trainers equipped to empower communities to effect social change. It is aimed to help practitioners return to their communities to run their own Training of Facilitator (TOF) workshops. This guide is intended to be used as a resource and reference text, rather than a blueprint for training.

This guide has been written for several reasons:

- There is a need to increase the number of participatory trainers who can mentor facilitators and offer support to practitioners in the field. These guidelines provide structured suggestions to consider, as well as ways to think through processes and practices as practitioners learn to construct their own *Reflect* TOF workshops.
- Trainers and facilitators have consistently requested that more resource materials be made available. These guidelines are offered as a resource document for *Reflect* trainers and practitioners to use in the various contexts in which they are implementing *Reflect*.

How this guide is structured

The guide is structured into 10 modules, each of which covers topics and issues relevant to *Reflect* trainers. Each module will guide us through a process of learning skills as well as content related to being a *Reflect* trainer.

MODULE ONE: Preparing for a Training of Facilitators (TOF) Workshop
This module introduces participants to the TOT course and the general objectives of the training. We reflect on how we can best prepare for TOF workshops, create a learning programme for a TOF workshop and get going with that programme. This knowledge will be useful when participants return to the field to plan their own TOF workshops and implement *Reflect* in their contexts.

MODULE TWO: Participatory Training
This module explores the concept of participatory training. What is participatory training about? What do we mean by the term 'trainer'? Who is a trainer and what are the responsibilities of this person? What are the personal and professional characteristics and skills of such a trainer? How do facilitators differ from trainers? What are ethics and how do they apply to trainers?

MODULE THREE: Adult Learning and Facilitation Skills

This module helps participants to think more deeply about how adults learn, and how we can best facilitate adult learning. We reflect on different factors influencing adult learning; we look at what is meant by a Freirean problem-based approach to learning and how we can facilitate this; and we also think about how we can deal with different behaviours in a group situation.

MODULE FOUR: *Reflect* Principles and Values

There are certain principles and values which *Reflect* practitioners at all levels draw on as an essential part of undertaking a critical analysis of their environment. These principles help us to develop political perspectives needed to gain insight into social and cultural issues as well as important concepts in development. This module will facilitate a more complex understanding of *Reflect* principles and how they can be applied in our various situations in order to sharpen our critical analytical skills.

MODULE FIVE: Baseline Studies

We now have a good understanding of what our responsibilities are as trainers, of how adults learn and the core principles of *Reflect*. The aim of this module is to draw these understandings together as we think about how we can improve our practice in the field. We will reflect on how to collect baseline data that will provide us with the insight we need to build a relevant and significant learning programme for the facilitators and participants with whom we work.

MODULE SIX AND SEVEN: Presenting and Analysing Baseline Data

Having gathered baseline data from our respective communities, we will now present these data and analyse them. This will help us build a foundation for a relevant and significant learning programme, as well as a monitoring and evaluation programme. In these modules we will not only think and talk about the kinds of information collected, but also the process we followed when collecting our baseline information. We will also think about presentation skills – important skills for trainers to master. And of course we will improve our analytical skills as we engage in a critical analysis of the data collected by ourselves and our colleagues.

MODULE EIGHT: Participatory Monitoring and Evaluation

Some time in the future, you will need to revisit the data you collected as part of your baseline study in order to evaluate whether things have changed and if so, how. In the meantime, you will need to conduct monitoring exercises to help you assess the changes on a more regular basis. In this module we will focus on helping you to develop the skills needed to monitor and evaluate *Reflect* programmes. We will examine what we mean by monitoring, (particularly Participatory Impact Monitoring or PIM) and evaluation and think about how we can improve our practice in the field.

MODULE NINE: Designing and Developing a Learning Curriculum

In this module we will review the key development issues identified during our community baseline studies and explore how we can develop these issues into a needs-based curriculum for a structured learning process. We will look at what information we need to develop a facilitator's guideline with learning units for a *Reflect* programme. We will also have the opportunity to practise writing our own materials as we think about how to implement actions to address the development issues we have discussed.

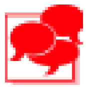
MODULE TEN: Implementing *Reflect*

In this final module of the course we will focus on issues related to the implementation of *Reflect*. We will discuss the key issues and steps that need to be considered when developing and implementing a *Reflect* programme. We will then focus on those areas which are pertinent to the role of trainers but which have not yet been addressed in this course – namely what facilitators' and trainers' responsibilities are; what managing a *Reflect* circle entails; and how best to support facilitators. By the end of this module, you should have a good overview of implementation and management issues.

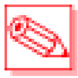
Activities

As you engage with this training guide, you will be invited to participate in a number of different activities. The following icons will let you know which activities are being suggested at different times:

When you see this icon, you'll know that the topic should be discussed in pairs or with your group.

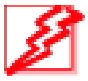


This icon tells you that you need to do a writing exercise or assignment. You will usually do writing exercises on your own.

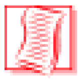


This icon suggests that you think of your own ideas that could be added to the training guidelines.

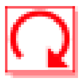
When you see this icon you will know that we are suggesting an activity which will break the ice or help revitalise the group when its energy seems a bit low – for example after lunch or after a long presentation by one person.



At the end of each module, you will be invited to engage in an exercise that will help you to consolidate what you have learned in the module.



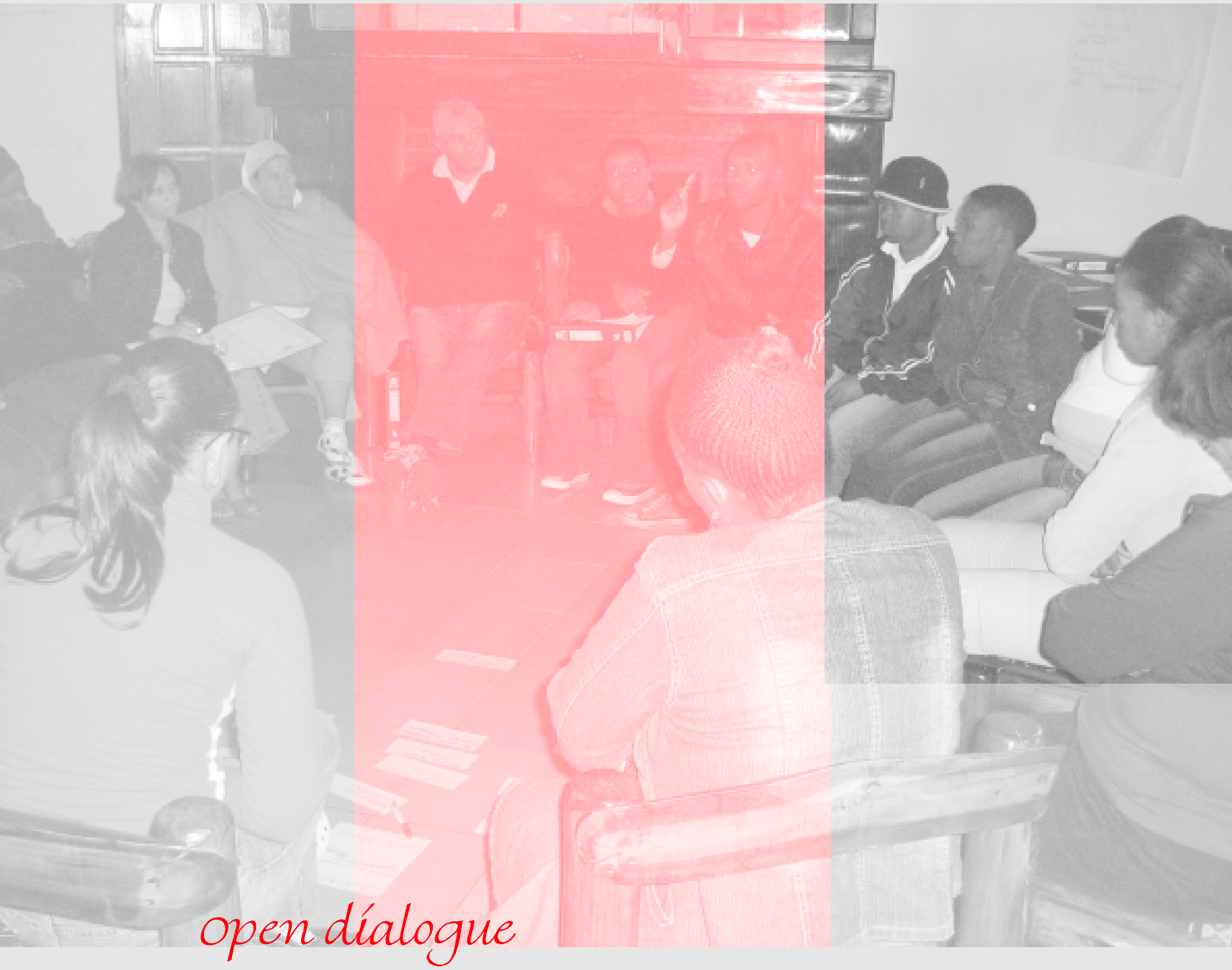
At the end of each module there will be an opportunity for you to evaluate the module and your experiences of it. It is important to reflect on your own learning and get regular feedback from others as you work towards improving the exercises offered in this training guide as well as your own practice.



Resources

At the back of the training guide you will find a resource section made up of:

- A glossary of selected words used in the training guide.
- A list of PRA tools, their purposes, how to construct them and possible uses.
- Some examples of TOF training workshop programmes.


open dialogue

Preparing for a Training of Facilitators (TOF) Workshop

MODULE 1

MODULE ONE introduces participants to the TOT course. We will discuss the general aims of this course, but we will also reflect on how we can best prepare for facilitator training (or TOF) workshops, create a learning programme for a facilitator training workshop and get going with that programme. This knowledge will be useful when participants return to the field to plan their own TOF workshops and implement REFLECT in their contexts.

Learning objectives:

In this module we will learn how to:

- Get to know each other
- Prepare for a workshop
- Create a programme of learning for a *Reflect* facilitator training
- Determine what should happen on the first day of training
- Think critically as we evaluate the day

- How do I prepare for a facilitator training workshop?
- How do I create a learning programme?
- What do I do on the first day of a workshop?
- How do I encourage people to talk to each other and feel relaxed?
- What aims should be established?

Preparing for a workshop

When preparing for a workshop or a training course, it is important to think about who will attend *(the participants)* and who will facilitate *(the trainer)*. It is also important to design a clear *programme of learning* for your training.

The participants

Since you are training to be a trainer, you will most likely be training local facilitators, i.e. *Reflect* practitioners who are working directly with local communities. While you may already know some of these people, it is important that you have some contact with prospective participants before you plan your training to assess training needs and find out what the broad expectations of the people attending the workshop are. Ask people what they hope to focus on and gain from the training. This will help you to design your training programme before the workshop. Usually Training of Facilitator – or TOF – workshops aim to enable the participants to adapt the *Reflect* approach for use in their specific contexts so that people are able to understand and assert their rights, communicate for change at all levels (individual, household and community), build local social movements and contribute to social development or transformation programmes in the area and beyond.

How many participants should attend a workshop?

The ideal size of a training workshop is between 15 and 25 participants. This helps to ensure that there is enough time and opportunity for all the participants to get involved in activities and share their experiences during group discussions.

The trainer

The primary role of the trainer in a *Reflect* training is to help the participants to not only learn, but experience the *Reflect* process in a structured way. The trainer helps the participants to learn and use various tools and techniques to analyse their contexts and plan for change. Because participants will learn by doing, the trainer should encourage active participation by participants who take complete charge of the content of the learning activities. The trainer guides the participants through the structured process, helping them to learn the basic principles for the framework of analysis – but this analysis is based on content which the participants bring to the training.

You may wish to have a co-trainer to help you with the training. This person can share responsibilities and help you manage group processes. Having another person will increase the range of experience and insights that you bring to the training. It is a good idea for trainers to plan the workshop programme together, deciding on the training agenda and who will take responsibility for introducing and facilitating activities on each day.

It is important that some time be set aside after each day to de-brief. This means giving feedback to each other – appreciating those activities that went well and reflecting on how things might be done differently next time. It may also mean thinking about how to adapt the next day's activities to ensure the learning programme reflects what emerges from the group and the participants' realities.

Creating a programme of learning

Before you can plan for what people will learn, you need to decide what your objectives for running the training are. These objectives should be shared with participants *before* they elect to participate in the training so that they know what to expect from the training and whether it is relevant to their own and their organisation's needs. When deciding on objectives, bear in mind who the participants are and what needs they have expressed to you. You also need to bear in mind the objectives of the *Reflect* implementing organisation from which the participants are drawn. Add other goals that you think are important in terms of what participants need to know about the structured learning process of *Reflect*. Being clear about your objectives will help you to choose which kinds of activities to include in your programme. When you begin the workshop, it is a good idea to write your objectives onto a large sheet of paper so that you can share these with the participants at the start of the workshop.

When planning your programme of learning, it is helpful to consider the following:

- Who your participants will be and what issues are likely to be relevant to their lives and work.

- How the activities are linked in order to create a logical sequence and good flow in the training.
- Whether you have planned to use a variety of workshop methods. There should be opportunities for participants to work in small groups, in the big group and sometimes by themselves. (Learning objectives and content should match the methods you choose.)
- Whether you have sufficient variety in the activities you have chosen. There needs to be a balance between introductory activities, challenging activities and those that give participants a chance to refresh (icebreakers and energisers).
- How much time should be spent on each activity.
- What materials (or handouts) would be useful to give the participants.

When you choose activities for your workshop programme, don't try to cover too much. If you pack too much into your workshop, there will not be enough time for participants to really explore the issues that are raised.

It is also important that you build flexibility into your programme. Although you need to have a clear programme for activities for the training, you need to be open to changing the programme during the training if the need arises. You might need to leave out some of the activities you had planned if time runs out, or change the focus of an activity. In other words, you need to be responsive to the needs, interests and experiences of the participants.

(In the Resources section at the back of this training guide, you will find some examples of learning programmes for TOF workshops that have been conducted in different southern African contexts over the past few years. These programmes will give you an overview of TOF learning programmes that have worked before.)

Structuring DAY ONE

Before your participants arrive, it is important to make sure that the venue in which you will be working is inviting and conducive to learning. Ensure that the room is clean, well lit, and a comfortable temperature. Arrange the chairs in a circle so that people can see and talk to each other. Also try to make sure that there is not too much noise disturbance. Have all your materials prepared beforehand and write up any flipcharts you know you will need ahead of time.

Creating a comfortable space for learning is an important part of creating a cooperative learning environment where participants can work together, and share their experiences and knowledge as they learn together. This is important for meaningful learning. The activities discussed below will also help to create a cooperative learning environment.

Welcome and introductions

It is important that everyone who is attending the workshop feels welcome, safe, secure and informed. This can be done by:

- Extending a warm welcome to all participants. After the trainer has welcomed everybody, s/he should introduce him/herself to the group and tell the group a little about him/herself, including his/her background and experience. (The trainer should emphasise that s/he is there, not as an expert, but as a guide and contributor to a collective learning process. The trainer is a partner in the learning experience, not a 'sage on the stage'.)

- Explaining the background to the training – how it has come about and who is supporting it financially (the funders).
- Giving participants a chance to get to know each other through an icebreaker activity. Some ideas for these are suggested below:

Activity 1

Icebreaker activities

Picture name game

- Give each person in the group a blank card and a felt-tipped marker.
- Ask everyone to write their name on the top of the card and then draw a picture that represents their name or themselves in some way. This usually generates some laughter and some puzzlement as people figure out what kind of picture to draw. Encourage those who feel they cannot draw to do so, explaining that it does not have to be a masterpiece! (It is a good time to mention that drawing symbols to represent things is an important part of *Reflect* as a visual as well as oral process.)
- Also ask participants to write down the different titles they have at home or in the community (e.g. as a pastor, mother, community development worker, teacher, etc.)
- When everyone has finished, people come to the front, introduce themselves and explain their drawing and then stick the card onto a designated 'Name area' on the wall.
- After everyone has presented their names and titles, and stuck their cards on the wall, discuss how we will let go of all titles for the duration of the workshop as we engage with each other as equal partners in the learning process. This will also give you as a trainer a chance to start discussing the principles of *Reflect* – i.e. that all participants are equal and that there is space for everyone to participate regardless of who they are or what position they hold. (Do mention that people can reclaim their titles at the end of the workshop!)

Learning names

(This game can follow on from the picture name game.)
Participants stand in a circle. One person calls out someone's name and throws a ball to her. She must then call out another person's name and throw the ball to the next person. And so it goes from person to person. When your name has been called twice, sit down. Keep going until everybody is sitting.

The name game

Participants sit or stand in a circle. One person starts by saying her own name and one thing about herself, for example "I am Naledi and I have two children". The next person then repeats what she said and adds on his own, for example "Naledi has two children, I am Simon and I like working in groups". The third person repeats the first two names adding on her own introduction. And so you go around the circle. If you can't remember a name or what was said, ask the person or others in the group to remind you.

Clarifying aims and expectations

Once participants are feeling more relaxed, they will want to know what the workshop is about and make sure that it is going to be a useful investment of their time. Participants will arrive with certain expectations and concerns. As a trainer, you need to know what these are so you can address them before the training starts, and where necessary negotiate different aims within the framework of the training course. This can be done in several ways:

- Ask participants to discuss their expectations for the workshop in small groups. Back in the large circle, ask everybody to call out one expectation. Write these on a flipchart. When an expectation is repeated, tick the ones you have already written.

OR

- You can ask participants to trace around both their left and right hand on a piece of paper. In the fingers of the left hand, ask participants to write down their fears or concerns related to the training. In the fingers of the right hand, ask them to write their hopes or expectations of the training. Once they have done this, invite participants to share their expectations and concerns verbally and display their hand sheet on a space on the wall. It is a nice idea to display the hands in the shape of a flower, or even a hand!

Sharing your objectives

Now that you have established what participants are expecting from the workshop, you can present the aims of the workshop and an outline of the workshop programme. This will enable you all to see if there are differences between what you have planned and what participants are expecting. If there are, you can see whether it is realistic, or not, to adjust the programme to accommodate participants' expectations. If everyone knows what to expect, it will help to ensure that the workshop is a success for all involved.

Make sure that the aims of the workshop are clearly set out and prepared on large paper before the start of the day. The aims of the TOT workshop are presented below:

By the end of this TOT workshop, participants will be able to:

- ✓ Understand participatory learning processes and practices
- ✓ Design and implement a *Reflect* TOF training programme for the facilitators with whom they work/will work
- ✓ Mentor facilitators to implement all aspects of *Reflect*
- ✓ Provide ongoing support to facilitators in the field (including monitoring and evaluation of facilitators).

Outlining the programme

It is a good idea to give participants an outline of what they can expect over the course of the whole training (see the Resources section at the back of this book for examples of Programme Outlines that have been used for TOF sessions in other southern African contexts). There should be some room for accommodating the expectations that participants have expressed during the previous activity. However, be sure that when you negotiate the programme you are flexible without compromising the learning aims and objectives of the training.

Defining our approach to learning

We learn best when we use all aspects of ourselves – our minds, our emotions, our senses and our bodies (as we engage physically in activities).

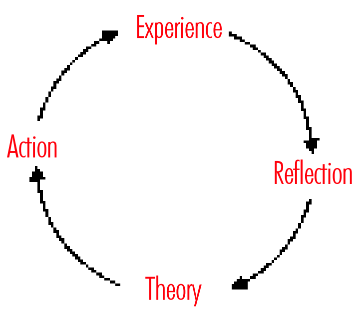
Tests have shown that people remember:

- **20%** of what they **hear**
- **30%** of what they **see**
- **50%** of what they **hear and see**
- **70%** of what they **see, hear and talk about**
- **90%** of what they **hear, see, talk about and do**[1]

The *Reflect* approach is participatory and therefore most compatible with an experiential approach to learning where participants are encouraged to learn by doing rather than just by hearing, seeing and talking.

Experiential Learning

There are four stages to the experiential learning cycle. The learner starts by engaging in an experience, by actually doing something. S/he then reflects on that experience and through reflecting, forms some kind of theory based on his/her reflections. The learner will then act based on the new thoughts about the first action, so beginning the experiential learning cycle again.



It is helpful to use a variety of activities to help people to stay interested and participate (and we will learn more about these throughout the training). However, this doesn't mean that anybody is free to do anything at any time – activities should be structured to fit with the learning objectives you have specified.

Establishing group norms and developing a code of conduct for group learning

Having group norms will help to create a safe space for people to trust one another and work together. Ask participants what kind of rules or norms they would like to establish for their time together. Make sure that everybody agrees with the 'rule' before it is adopted. It is a good idea to write up the group norms and have these displayed on a wall of the training room throughout the workshop. It is also a good idea to establish with the group what they will do if the norms are not adhered to.

Some examples of group 'rules' that other groups have come up with include:

- Respecting one another by listening to, and not laughing at each other
- Enabling participation by allowing translation where needed
- Taking responsibility for learning and getting what we want

1 From *How to Teach Adults 1*, The ABET trainer series, USWE in 1995

- Respecting confidentiality
- Keeping time
- Informing the group if someone is to be absent
- Switching off cell phones during sessions
- Speaking openly about norms that are not adhered to
- … and so on

Practical arrangements

It will help participants to feel comfortable if they know what the practical arrangements are. Things like where the toilets are, where and what time meals and refreshments will be served, where the telephones are, who can translate, etc – should all be discussed with the group. Give people a chance to ask questions and make sure that everyone feels comfortable with the practical arrangements. This is also a good time to agree with the group what times they would like to start and finish the day and when they would like breaks. You can then adjust the plan for the day accordingly.

It is also a good idea to ask for volunteers to take on some of the roles and responsibilities of the training workshop – e.g. for timekeeping, for monitoring and evaluating, for making sure that everyone is happy, etc. Such roles and responsibilities should be shared amongst the participants as the training progresses day by day.

Exercise to consolidate learning

- Discuss what information you found useful and why.
- Discuss what activities you found useful and why.
- Think about when you get back to the field. Discuss whether there is anything that you have done today that you can use in your own training?
- Draft a plan to introduce your next TOF training workshop when you return to the field.
  - i) List the different items you should consider when planning and preparing for a TOF.
  - ii) List the different items you should consider when introducing your training.
  - iii) Structure all these within a timetable.

> Remember that some examples of TOF programmes are set out at the back of these guidelines.

Evaluation of the day

It is important to get regular feedback from participants throughout the workshop in order to adapt the programme to suit the needs of the participants. It is therefore a good idea to end each day by evaluating the day and participants' experiences of the activities.

- Ask participants to stand in a circle and have a ball ready for them to throw to one another.
- As they throw the ball to one another, they will take turns to say one thing about the day (this might be something they learned, or something they liked, or something that they did not like.)

Participatory Training

Participatory Training

MODULE 2

MODULE TWO explores the concept of participatory training. What is participatory training about? What do we mean by the term 'trainer'? Who is a trainer and what are the responsibilities of this person? What are the personal and professional characteristics and skills of such a trainer? How do facilitators differ from trainers? What are ethics and how do they apply to trainers?

Learning objectives:

In this module we will learn about:

- the concept of participatory training
- the characteristics, activities and roles of a participatory trainer
- how a 'trainer' and 'facilitator' differ
- the personal and professional aspects of being a participatory trainer
- the ethics of being a trainer and/or a facilitator
- how we can develop and grow a supportive network for *Reflect* trainers in our areas and region
- how we can evaluate the day

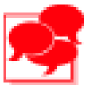
- What is participatory training about?
- Who is a participatory trainer?
- What are the personal and professional characteristics and skills of such a trainer?
- How do facilitators differ from trainers?
- What are ethics and how do they apply to trainers?

Participatory training

The conventional understanding of a 'trainer' suggests an expert who transfers knowledge or skills to a trainee who is a novice with little to contribute to the learning process. 'Participatory training' challenges these ideas, and sees both the trainee and the trainer as co-participants who learn from each other, sharing responsibility for co-creating new knowledge. The trainer and the participant trainees both have a shared responsibility for creating knowledge as part of a participatory and empowering learning process. The *Reflect* trainer is expected to facilitate this kind of empowering learning process, and can also therefore be seen to be a facilitator. We will use the term 'participatory trainer' to denote someone who takes responsibility for facilitating the process of learning for other facilitators.

Characteristics, activities and roles of a participatory trainer and a facilitator

Activity 1



Group work through discussion and brainstorming

Purpose:
To encourage participants to reflect on and talk about the characteristics, activities and roles of a participatory trainer.

What you need:
✓ A4 paper and pens/pencils
✓ Flipchart paper
✓ Koki pens
✓ Prestik

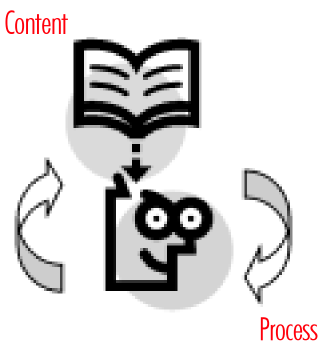
What to do:
- In groups of two or three, discuss what experience you have as a trainer and/or facilitator? Were these experiences different, and if so, how? What did you do differently in these different roles?
- Still working in small groups, think of the best trainer and/or facilitator you ever had. On a piece of paper, list qualities that made them good. You can also think of the worst trainer and/or facilitator you ever had and list the qualities you disliked about them.
- As a group, make a mind map that considers:
  i) the characteristics of a participatory trainer
  ii) what a participatory trainer does
  iii) the roles of a participatory trainer
- Present this to the plenary group.

Make sure that the following points have been considered during discussion:

Characteristics of a participatory trainer

✓ Communicates effectively.
✓ Is flexible (enough to adjust both the training process and content to meet the needs of the trainees).
✓ Has the *personal* qualities needed to facilitate an empowering process (be patient, respectful, caring, disciplined, committed, etc).
✓ Has the *professional* qualities needed to design and facilitate an empowering ***process*** (understands how adults learn, understands participatory learning and action tools, understands the principles and methodologies of *Reflect*).

These areas of knowlege will be explored in more detail as we progress through the course



What does a participatory trainer do?
- A participatory trainer focuses on and is aware of **group process** (and how to use the group process as an effective way to help learners to solve problems).

  As a trainer you are wearing an extra pair of glasses – you need to think not only about the *content* that your learners are engaging with, but also the learning *process* by which people are learning that *content* as they interact with each other.

- A participatory trainer creates the right environment and conditions to promote learning.
- A participatory trainer builds on the knowledge that the learner already has.
- A participatory trainer uses a problem-centred approach.
- A participatory trainer relates the training to the context in which it will apply.
- A participatory trainer uses his/her skills to help the group 'gel'. This includes helping the group establish and stick to ground rules, solve problems, set goals and make agreed decisions.
- A participatory trainer helps the learner to take responsibility for and be in control of their own learning (as opposed to instructing learners).
- A participatory trainer gets trainees involved in the learning experience.
- A participatory trainer uses questioning techniques and elicits feedback to make sure that the trainees understand and can apply the information provided and the skills taught.
- A participatory trainer knows how to resolve conflict and build consensus.
- A participatory trainer intervenes in a way that is appropriate to the group's level of ability to facilitate its own process.

What are the roles of a participatory trainer?

- **Coach** – helps the learner to design learning processes and a plan for implementing these designs. A coach will also observe the learners as they carry out these plans, offering suggestions, demonstrating, helping learners identify opportunities, monitoring progress, suggesting new approaches where necessary. A coach helps learners to become increasingly aware of their knowledge, attitudes and skills and how they are using these.
- **Guide** – points the learners in an appropriate direction and helps them negotiate a path towards their goal. A guide helps learners to keep their vision updated. Part of this includes shaping good learning habits and routines and developing learning environments appropriate for their needs.
- **Learning environment architect** – assists learners to construct a learning environment tailored to their own needs.
- **Critical analyst** – helps learners to see that training is not a neutral process, but rather a value-led process where relations of power (gender, class, race, ethnicity, power of trainer's status and power of participants) should be constantly analysed.
- **Role model and mentor** – models the behaviours, attitudes and skills that are appropriate for a trainer.
- **Evaluator** – offers the learners another perspective on their learning progress and invites them to recognise where they need to change. This includes helping them to recognise how their beliefs shape their existing and new practices. An evaluator also helps learners to learn how to monitor their progress and make appropriate adjustments.

Participatory training versus facilitation

Discussion

- In small groups, discuss what a participatory trainer does that a facilitator does not – and vice versa.

Participatory trainer versus facilitator

Participatory trainers and facilitators have different roles. Both participatory trainers and facilitators can be resource people in one or another subject, they can both contribute to the creation of new knowledge and skills. However, participatory trainers are primarily responsible for ***designing and managing a learning process*** that is flexible, informal, non-threatening but also objective-orientated. A participatory trainer should ensure that there are opportunities for reflection on lessons learned, s/he should give feedback, and ensure learners' participation in curriculum development. When it is appropriate, the participatory trainer may play the role of content leader on a particular issue, but this is not the participatory trainer's primary responsibility.

Activity 2

Creating a Venn diagram

Purpose:

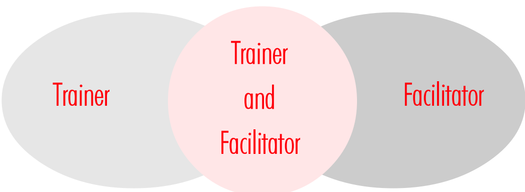
To provide an opportunity for participants to think about the similarities and differences between a participatory trainer and a facilitator.

What you need:

- ✓ Flipchart paper
- ✓ Blank A4 paper
- ✓ Pens or pencils
- ✓ Crayons

What to do:

- A Venn diagram helps to show us similarities and differences between things – with the overlapping area showing the similarities and the other areas showing the differences. Working in pairs or small groups, create a Venn diagram like the one pictured here on the left. Your Venn diagram should show the common characteristics and responsibilities of a trainer and a facilitator. The diagram should also show areas of difference between a trainer and a facilitator.



- A participatory trainer operates on a 'meta level', focusing not only on content but also on *process*. The trainer is like a bird flying over a forest – s/he must have a bird's eye view of everything that is happening, how it is happening and whether to adapt activities if things are not going as planned. A facilitator on the other hand is someone walking and guiding others through the forest – s/he is more engaged in the actual tasks of helping community members to identify issues or problems and how to take action to address issues.

- Trainers and facilitators also work with different target audiences. A trainer works with facilitators whereas facilitators work with circle participants.
- There are many areas of commonality between a trainer and a facilitator:
  - Both encourage active participation and promote active learning
  - Both stimulate discussion
  - Both have strong communication skills
  - Both encourage sharing of learning and experiences
  - Both have a positive attitude toward their learners
  - Etc.
- Now that we have explored the differences and similarities between a trainer and a facilitator, think about how you would position yourself. Do you consider yourself to be more of a facilitator or more of a trainer? Why? (Ask participants to position themselves physically along a continuum with 'trainer' at one end, and 'facilitator' at the other. Participants can then reflect on why they have positioned themselves there.)
- Activity 3 below will help you to think more deeply about your own position:

Self-assessment

Activity 3

Purpose:
- To think about the knowledge, skills and attitudes that you need to strengthen in order to become a better trainer
- To reflect on specific knowledge and skills you want to gain during the course of this training

What you need:
✓ Pen or pencil
✓ Copy of the 'Self-evaluation worksheet' on page 18

What to do:
- Sit quietly and think about all the areas of knowledge and skills that trainers need. Some of these are listed in the table, but you might think of others as well. If you do, write these into the blocks provided.
- Give yourself a score for how well you think you perform in each of the knowledge and skill areas.
- Write down any comments you have. Try to describe to yourself exactly what you want to improve and why.
- When you have completed steps (i) to (iii) for the whole table, see which of these areas you think are most important **to you**? Which would you most like to develop? Assign number 1 to the area you would most like to improve, number 2 to the next most important and so on …

Self-evaluation worksheet

Knowledge area	**Scoring of myself** (1 – weak, 10 – strong)	**Comment to myself** (describe what I *want* to improve and why)	**Rating of importance**
Knowledge of how adults learn			
Problem-centred learning			
Development issues at local, regional, national and global levels			
Monitoring and evaluation			
Skills	**Rating of myself** (1 – weak, 10 – strong)	**Comment to myself** (describe what I want to improve and why)	**Rating of importance**
Knowledge of how adults learn			
Communication (listening, expressing yourself, presenting ideas)			
Planning			
Creating a conducive learning environment that is learner-centred and needs-based			
Facilitating a group process			
Managing group dynamics			
Taking notes			
Designing learning materials			
Analysing relations of power			
Observation			
Giving feedback			
Evaluation			

Self-evaluation worksheet

Fill out the evaluation sheet on the opposite page.

After the training, you will have an opportunity to review your self-assessment sheet and see whether you feel you have improved on any of your priority areas. You will also have a chance to identify further learning goals and develop a personal learning plan that will help you to keep growing as a trainer.

The ethics of training and facilitation

For every person entering the education and development field, there is a challenging and professional question – "Am I able to live the principles that I share with others?" It is important for the development of both trainers and facilitators to seriously consider how well they are able to 'walk the talk'. In the course of this training, trainees will be asked to consider this question for themselves, and they will be asked to observe the trainers giving this course and let them know whether they have effectively modelled the principles and approaches they advocate.

What does 'ethics' mean? How would you define 'ethics'?

Questions for debate

- What kind of ethical dilemmas have you as a trainer/facilitator working in the development field faced?
- How have you responded to these dilemmas?
- Do you think it is important for facilitators and trainers to have a code of ethical conduct? Why or why not?
- What are the ethical dimensions of training and facilitating? What should be included in such a code of conduct?

Activity 4

Code of conduct

Purpose:

- To identify important principles that should guide participatory practice
- To create a code of conduct that can be used to guide facilitators' practice in the field

What you need:

✓ Koki pens

✓ Flipchart paper

What to do:

- In groups, identify 3 principles that you think should be included in a code of conduct for *Reflect* practitioners. Write these onto pieces of card.
- Present these to the plenary.
- Cluster the cards as you debate with others the importance of the principles you have identified.
- Collate a 'Code of Conduct' from those principles that the plenary agrees are critical to practice.

Building a supportive network and a 'community of practice'

A code of conduct can provide *Reflect* practitioners with common ground rules that unite practitioners in the work they are doing. This can help us to build a 'community of practice' where we understand what our roles and responsibilities are and what is expected of us as professionals within the field of education and training. New people entering this field will also have guidelines to assist them to understand and participate in the field.

Being part of a community of practice also means that we create opportunities to share our learnings, practices and resources as we come together in discussion and action. We build relationships with one another as we organise around particular areas of knowledge and activities that matter to us and our communities. This mirrors one of the fundamental *Reflect* principles – we learn from each other as we engage in a participatory process of sharing our ideas, understandings and actions.

The relationships we have with one another are critical. We need to explore ways in which we as *Reflect* trainers and practitioners can build up a strong network that will support us to further not only our learning, but also our aims of effecting social change.

Discussion

- How can we draw on and encourage each other in these pursuits?

Activity 5 **Weaving a web**

Purpose:
- To encourage networking and on-going support amongst the participants

What you need:
✓ A ball of string or wool

What to do:
- Think of one or two people in this group with whom you connect in some way. (These people do not have to be geographically close – you may find you can connect through similar ideas or activities that you are engaged with in quite different geographical areas.)
- Stand in a circle. One person in the circle will have a ball of string. That person should hold onto the end of the string and then throw the ball of string to another person in the circle with whom they would like to forge a connection as members of the *Reflect* community of practice. As they throw the ball, they should mention the person's name and the connection that they see now, or would like to see in the future. They can also briefly explain why this connection is, or might be useful. As people catch the ball of string, they should wind the string around their finger before throwing the string on. This will ensure that the connection is not lost. By the end of the exercise, participants will see how we are all connected in a web of relationships tying us together.

Questions for reflection and planning the way forward

- Think of two ways in which you can contribute to building a stronger support network from the position in which you work and live. (Who can you contact, what can be done, how can this be done?)
- Write down 3 things you would like to gain or give from forging such connections.
- Write down 3 concrete steps that you are going to take to make sure that these connections are translated into action. You may like to use the planning matrix below.

Planning matrix to help build a stronger network with others in my community of practice:

Who will I contact?	In what ways can we connect?	By when will I do this?	Do I need to prepare in any way?	Do I need any resources? If so, what?	How will I secure these resources?

Exercise to consolidate learning

- What activities have we done today that you can use or adapt when you train facilitators?

Evaluation of the day: Evaluation line

This brief and simple method of evaluating the day's session will be used today because it requires participants to be physically active as they evaluate the day. (Since they have engaged in a number of quieter reflective and evaluative activities, they will probably welcome the chance to move around.)

- Ask participants to stand in a line from a point where "you didn't learn anything new" to a point where "you learnt an enormous amount".
- Once participants have arranged themselves, ask for a quick verbal report from each person as to why they chose to stand where they are.

Adult learning and facilitation skills

Adult Learning
and Facilitation Skills

MODULE 3

MODULE THREE helps participants to think more deeply about how adults learn, and how we can best facilitate adult learning. We reflect on different factors influencing adult learning; we look at what is meant by a Freirean problem-based approach to learning and how we can facilitate this; and we also think about how we can overcome challenging behaviours in a group situation.

Learning objectives:

In this module we will learn about:

- how adults learn
- the different factors that influence adult learning
- how we can create the best atmosphere for adults to learn
- barriers to adult learning
- the Freirean problem-based and empowering approach to learning
- what skills are needed to be an effective facilitator
- the main tasks of a facilitator
- different kinds of behaviours in a group and how we, as trainers/facilitators, can deal with these
- critical reflection skills through an evaluation of the day

- How do adults learn?
- How can we create a good atmosphere for learning?
- What does Freire say about learning?
- As trainers, what skills do we need to become good facilitators of adult learning?
- What does an effective facilitator do?
- What are the main tasks of a facilitator?
- How does a facilitator deal with resistance to participation?

How do adults learn?

Numbers game[1]

Activity 1

Purpose:

- To demonstrate to participants the different ways that adults learn
- To discuss the different factors that influence adult learning

What you need:

✓ Copies of the numbers worksheet on page 25(5 copies per person)
✓ Copies of the score chart on page 26 (1 copy per person)
✓ Pens or pencils

What to do:

- Make sure everybody has a pen/pencil and each trainee a copy of the Numbers Worksheet. They should not write anything until you tell them to start.

[1] This exercise has been taken from the '*Reflect* Training Guide for the Training of Community Facilitators' compiled by Carola Addington and Rhudzani Khalushi of the Land Research Unit in May 2000.

Activity 1 continued

- Explain that they should draw lines on the paper, linking the numbers in chronological order – starting at number 1, then 2, then 3 and so on until you tell them to stop. You will give them about 2 minutes.
- When everybody is clear about what to do, tell them to start. Stop after 2 minutes. They should write Number 1 at the top of this page.
- Hand out another copy of the Numbers Worksheet and make sure no-one starts writing until everyone is ready to start.
- Repeat the process again, telling them to stop after 2 minutes and asking them to write the page number at the top.
- Continue 5 times, or until you feel they have had enough!
- Hand out the charts page. Participants should complete the chart by indicating the highest number they reached on each numbers page. The bottom chart provides an example of how this is done.
- When they have finished, put all the charts on the floor in the middle of the room and encourage people to walk around and look at each others' charts. It is a nice idea to ask participants to lay their charts in a circle or oval shape, so that everyone can walk around them together.
- Discuss the questions below once:

Questions for discussion

- How was this exercise for you? Was it easy/difficult/frustrating? Why?
- Are you surprised by the shape of your learning curve?
- Are you surprised by other people's learning curves?
- Why do you think that most people's curves went up and down?
- What are the factors that affect the way we learn to do things?

Activity 2

Brainstorming ideas about different ways of learning

Purpose:

- To share ideas about the different ways of learning
- To discuss how we can create a good atmosphere for adults to learn
- To reflect on how we can become good trainers/facilitators

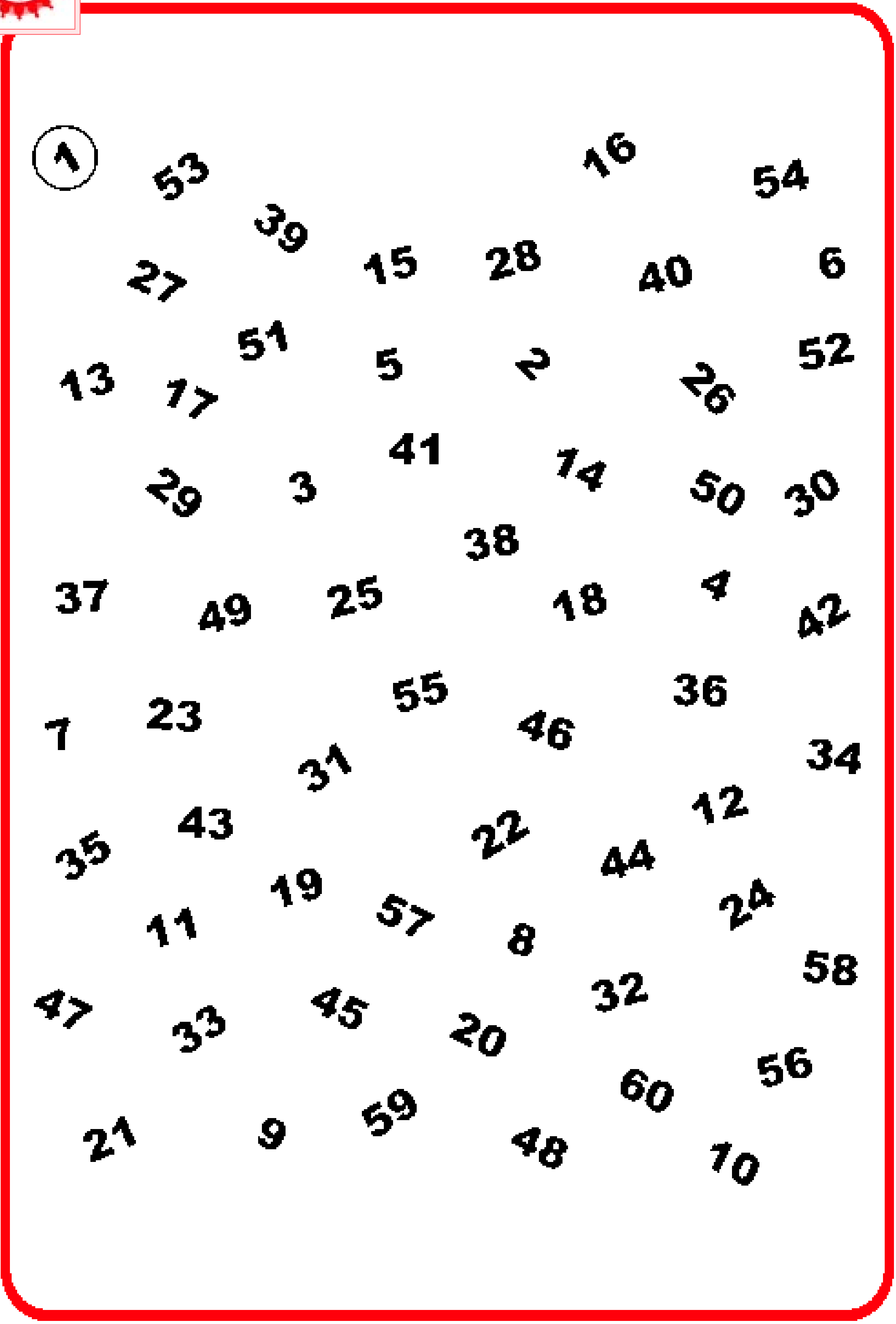
What you need:

✓ Flipchart paper
✓ Koki pens
✓ Prestik

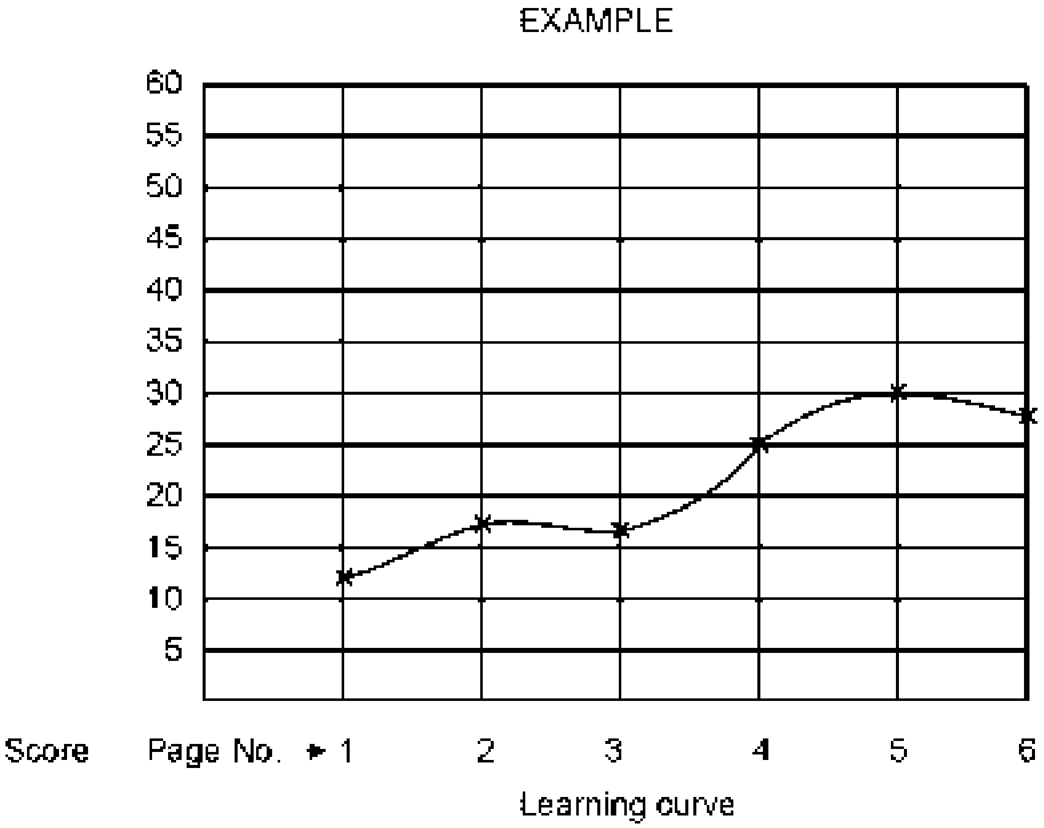
What to do:

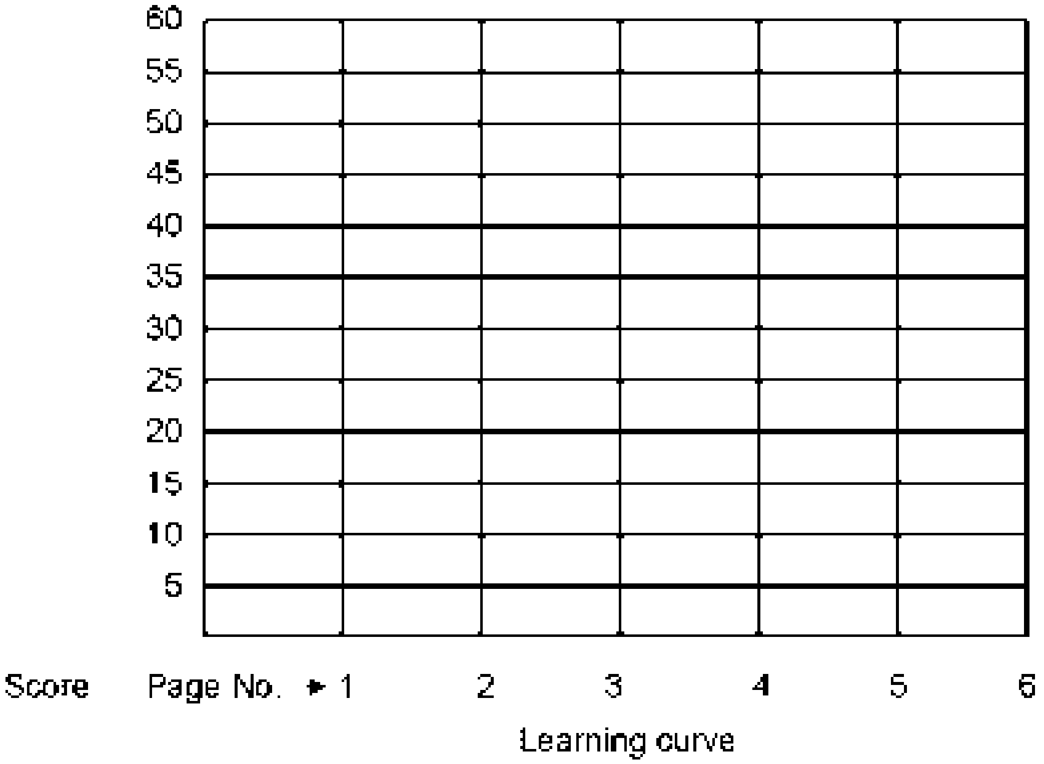
- Work with a partner or in a small group to brainstorm your ideas around the following:
  – Discuss the different activities that helped you to learn at school and in other learning environments. Write these down.
  – Discuss the different factors that hindered your learning at school.
  – Discuss the different ways in which you learned. Write these down.

The Number Game – Numbers



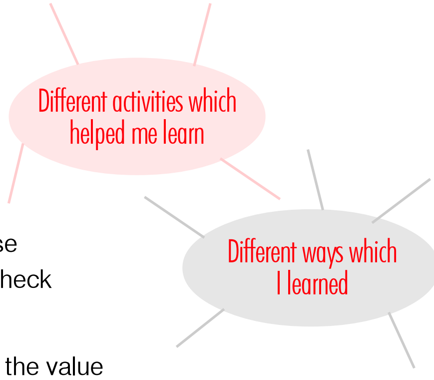
The Number Game – Score Charts





Brainstorming is a way of sharing your first thoughts and ideas about a topic or idea. It is useful to brainstorm before going into more detailed discussion as this helps bring ideas and thoughts about a topic out into the open.

- Begin by writing the topic or key words you want people to think about in the centre of a circle on a big page of paper.
- Invite participants to share their thoughts about these topics or key words.
- Try to group the ideas that are similar together as you write them down.
- Write up participants' contributions as they share them. Don't rephrase them – if you are unclear, rather ask participants more questions and check with them to make sure you have understood.



(It is important to write up participants contributions because this affirms the value and validity of what they think. If participants contribute ideas that are incorrect, discuss these before writing them up in a way that is acceptable to both you and the participants.)

- Working in pairs, make a table like this one to help you group your ideas together.

Different activities which helped me to learn	Different ways in which I learned
Making symbols and drawings	Writing things down
Games	Repeating things
Songs with actions	Listening
Doing hands-on activities (like practising sewing or gardening)	Practising
…	…

Questions for discussion

- Were you surprised by how many different ways there are to help us learn?
- What do you think adult learners are more likely to remember: something they learned in a classroom environment, or something they learned through experience?
- How can you provide opportunities for your facilitators to learn experientially?

Talking wheel: Thinking about barriers to adult learning[2]

Activity 3

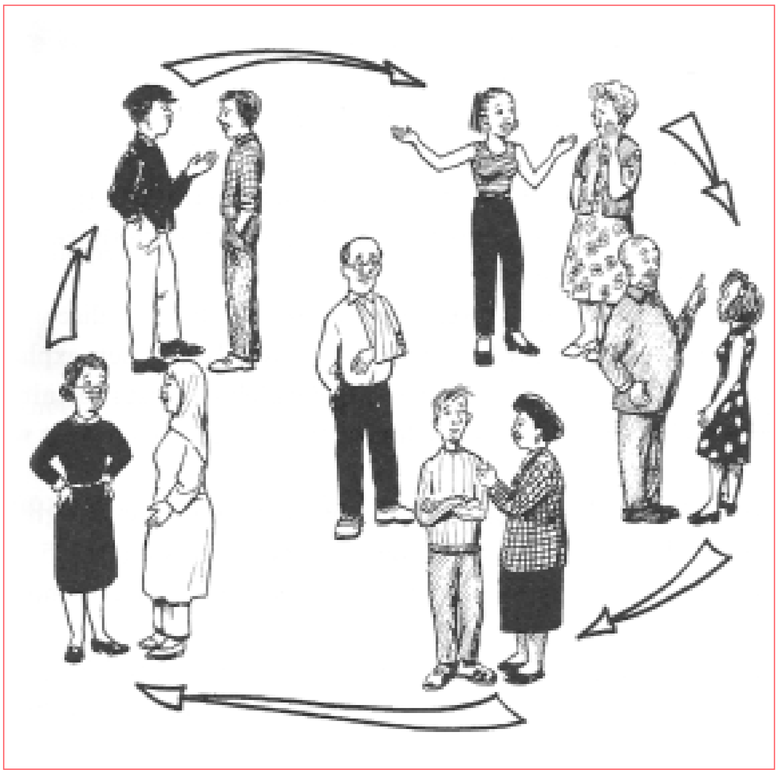
Purpose:

- To understand and share ideas about some of the problems that adults have with learning
- To provide an opportunity for participants to hear and share different views and experiences

What you need:

✓ A list of questions and/or statements that you have prepared before hand to use in this activity.

2 Activities adapted from *Shifting Paradigms*. An Early Learning Resource Unit publication, 1997



What to do:

- Ask participants to find a partner and stand opposite him/her so that the group forms an inner and outer circle.
- Instruct the participants to share with their partners their thoughts about the questions/statements that you call out.
- Ask the first question/statement on your list. Allow about 2 minutes for the participants to discuss this.
- Now tell the outer circle to move one person to the left. Provide another question/statement for the participants to discuss with their new partners.
- Continue this process until you have asked all your questions, or until participants have had enough discussion.

Questions and statements about adult learning

- Imagine that you have signed up for a new course on nuclear physics. What fears or problems do you have that might hold you back from doing well in this course?
- What problems have you experienced in your learning as an adult? (These could be practical problems/financial difficulties/family or work responsibilities or problems with confidence or lack of skills.)
- Name two things that you would really like to learn to do before you die. What barriers do you think you might experience in achieving these goals?
- Name one learning accomplishment that you have achieved as an adult and are proud of.
- Why should adults be encouraged to keep learning?
- What problems or barriers to learning do you think your facilitators and their participants experience?
- How can we as trainers help with overcoming barriers to learning?

Make sure that the following points have been considered during discussion:

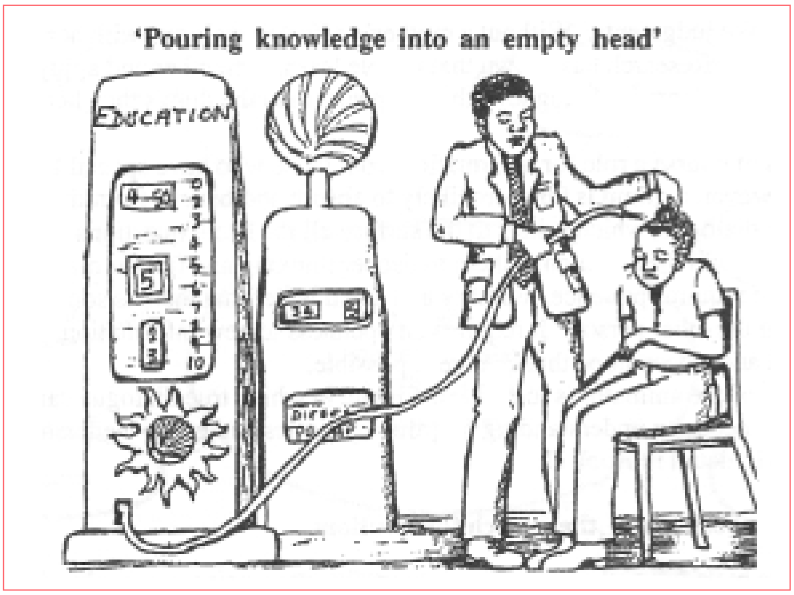
Adult learning

- Adults learn at different speeds – some learn quickly, while others take longer (and this may be affected by the many things that adults have to cope with in their lives).
- Adults learn in different ways. Some people like games, others do not.
- Some adults are quiet, others participate a lot.
- Adults learn well when something is of interest to them.
- Adults like variation. When we work with adults, it is best not to do the same activity for too long.

- Adults have a lot of experience to draw on when they are learning, and can usually make important contributions to the discussion.
- Through analysing their experience, participants can gain a great deal of learning.
- Adults like to learn when the learning is focused on a problem that is relevant to their lives.
- Adults like to participate in planning their learning. They like to decide for themselves what is important, rather than just being told.
- Adults often enjoy working together.
- Adults learn best in environments where they feel respected and valued.
- Most importantly, adults learn best when they learn something that is useful. Adults' lives are full, and they don't like to waste time learning what will not be meaningful to them in their lives.
- There may be certain barriers to adults learning (such as financial, family and work responsibilities, or a lack of confidence, or not knowing how to learn formally). These should be discussed with learners and where possible addressed (for example through preparing thoroughly, helping adults to build their confidence and feel valued).

Facilitation skills

Now we have seen how adults like to learn. It is unlikely that adults will enjoy it if a teacher stands at the front of the room and tells people what to do or what they should know. Adults are not empty vessels to be filled up with knowledge (as is shown in the picture[3]).



'Pouring knowledge into an empty head'

Adults prefer to be treated with respect and have their existing knowledge valued and challenged. They enjoy a problem-posing approach to learning whereby they are asked questions and given time to discuss problems (rather than just being told what the answer is). In answering questions, adults have an opportunity to share their knowledge and experiences with their fellow learners as well as their teachers or trainers, and thereby learn from each other as colleagues or partners in the learning experience.

Paulo Freire promoted the idea of problem-posing education. This approach aims to liberate people both in terms of their thinking and their daily lives. Adults actively engage with ideas about their own problems, situations and lives. They discover their own truths, questioning ideas in a way that has relevance for them as individuals, but also as members of communities and society in general. In this way, knowledge creates change on all levels – as is shown in the diagram on the next page[4].

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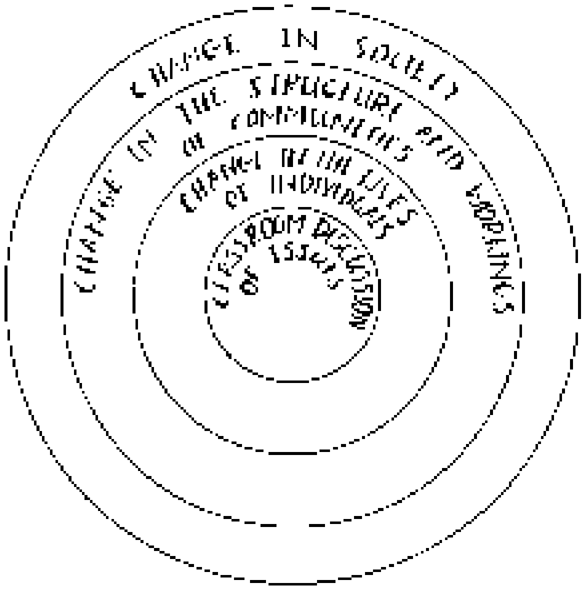
3 Picture from *Training for Transformation*, Book 1 by Anne Hope and Sally Timmel,1984
4 Information and diagram from *How to Teach Adults 2*, The ABET trainer series, USWE in 1996



The Freirean facilitator/trainer encourages learners to:

- Think about learning in relation to their own experiences.
- Ask questions and dialogue with others
- Develop their own explanations through discussion and debate.
- Be curious and try to find out more information about things which are important to their lives.
- Question the reliability of knowledge and 'facts'.
- Develop the confidence and skills to act, reflect and evaluate.

Asking questions is not only an important skill for learners/participants to acquire – it is also a very important facilitation skill. Asking questions encourages learners/participants to find ways to use their knowledge to solve a problem, rather than just listening passively to an answer from the teacher/trainer/expert.

Activity 4

Exploring facilitation skills

Purpose:

- To ask ourselves questions that help us to reflect on our experiences of good and bad facilitation skills
- To develop a better understanding of good facilitation skills

What you need:

✓ Flipchart paper
✓ Koki pens
✓ Prestik

What to do:

- Working with your colleagues in a small group, discuss the following questions:
  - What were your teachers like at school? Can you remember those who were 'good' and those who were 'bad' teachers? Describe these teachers.
  - What was it that made these teachers 'good' or 'bad'? What did they do as teachers? What did they ask you to do as learners?
- On a flipchart, make a table like this one to summarise your thoughts about what makes a good and bad teacher (some examples have been included here).

Good teacher (or facilitator)	Bad teacher (or facilitator)
Well prepared	Lacks interest and motivation to work
Helpful	Doesn't help learners
Shows respect to learners	Insults learners and makes them feel stupid
…	…

The good qualities you have recognised in your teachers are also true of good facilitators. Make sure that the following points have been considered during discussion:

A good facilitator

- ✓ Respects the participants
- ✓ Takes learners' needs into account and is flexible
- ✓ Is humble and treats participants as equals
- ✓ Gives participants responsibility
- ✓ Encourages participation, dialogue and interaction
- ✓ Manages time
- ✓ Manages the learning process
- ✓ Plans sessions well
- ✓ Uses a variety of techniques and methods to facilitate learning (group work, discussion, tasks and activities)
- ✓ Guides, but doesn't dominate
- ✓ Asks questions
- ✓ Is always ready to explain and clarify
- ✓ Helps people in conflict to understand each other's viewpoints
- ✓ Speaks clearly and not too fast
- ✓ Writes clearly
- ✓ Corrects errors, but not in a way that makes the participant feel embarrassed
- ✓ Makes eye contact with participants
- ✓ Accommodates differences in learning abilities, styles and speeds

Thinking about different behaviours in a group

Activity 5

We have thought a lot about what it means to be a good facilitator, but this isn't always easy. In most groups there are people who are challenging. In this activity we will think about what we can do when we encounter challenging behaviours in a group. We will also look at some pictures of various animals and try to identify behaviours that are familiar.

Purpose:

- To identify behaviours that can be unhelpful to a group
- To think about ways to counteract such behaviours

What you need:

✓ Copies of the 'Unhelpful behaviour in a group' sheets[5] on pages 34–36

What to do:

- Ask participants: Have you ever been in a group situation where someone presented a challenging behaviour? Describe the situation:
  - What happened? What did you do?
  - How did you feel?
  - What did the trainer/facilitator do?
  - Was this a good way of handling the situation? Why/why not?
  - What else could have been done?
  - Give each participant a copy of the 'Unhelpful behaviour in a group' sheets (at the end of this module on pages 34–36).

[5] Taken from *How to Teach Adults 1*, The ABET trainer series, USWE in 1995

- Ask participants to look through the pictures and see whether they have noticed people who show similar characteristics to these animals in a group situation.
- Ask participants how they would deal with people who show signs of behaving like the animals depicted in the sheets.

Make sure that the following points have been considered during discussion:

Dealing with challenging behaviours:

- Different behaviours will require different interventions. Here are some suggestions for coping with some of the problematic behaviours:

Animal	Action
Donkey	Take them out of the room and speak to them quietly alone
Lion	Talk politely to them (don't fight)
Mouse	Try to encourage them
Monkey	Give the person something to do, some responsibility
Peacock	Talk to the person, show them the advantages of cooperation, of people working together. Sometimes you get peacocks at the beginning of a group, but after some time they relax.
Hippo	Give them different activities to do to wake them up

- You can also sometimes address challenging behaviours by getting people to work together in pairs or smaller groups. This can help to change group dynamics or make the behaviour less noticeable.
- If difficult behaviour persists, you can take the person aside and talk to them to find out if there is something wrong. Sometimes people behave badly because they have problems.

Exercise to consolidate learning

- How can you integrate what you have learned today into a learning programme for facilitators that you train?
- What learning objectives will you include?
- What learning activities will you include?

Evaluation of the day: Throwing the dice[6]

Purpose:

- To give participants an opportunity to reflect on the day
- To provide an opportunity for participants to give feedback on the usefulness of the day

What you need:

- Before the workshop, make a large dice from cardboard or by covering a square box with paper and drawing 1 to 6 on the sides like a dice. On a large sheet of paper, write six questions and number them 1 – 6.

[6] From *Shifting Paradigms*. An Early Learning Resource Unit publication, 1997

(Some of these questions will provide feedback to the facilitators and other questions will help the participants to internalise and apply their learnings and to give feedback.)

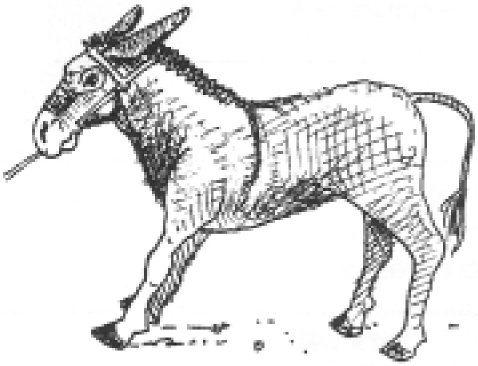
These are the 6 questions:

1. Mention something you enjoyed about today.
2. What was an important thing that you learned?
3. Mention something you didn't like.
4. How did you find the range of activities you engaged in today?
5. Comment on the process and the content of today.
6. What learning or ideas from today can you use in your work?

What to do:

- Put up the questions on a wall in the room.
- Ask participants to sit in a circle. Begin by handing the dice to one of the participants. Ask the participant to throw the dice. After a person throws the dice, s/he answers the question which has the same number as the side of the dice which is facing upwards.

Unhelpful behaviours in a group
Sheet 1

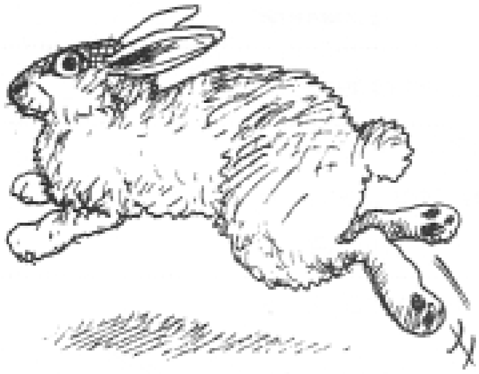


The Donkey

who is very stubborn, will not change his/her point of view.

The lion

who gets in and fights whenever anyone disagrees with his/her plans or interferes with her or his desires.

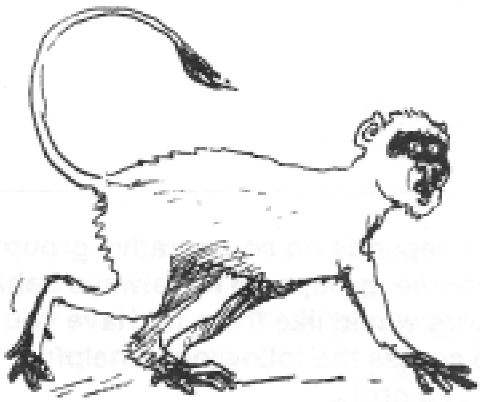


The Rabbit

who runs away as soon as (s)he senses tension, conflict, or an unpleasant job. This may mean quickly switching to another topic. (Flight behaviour.)

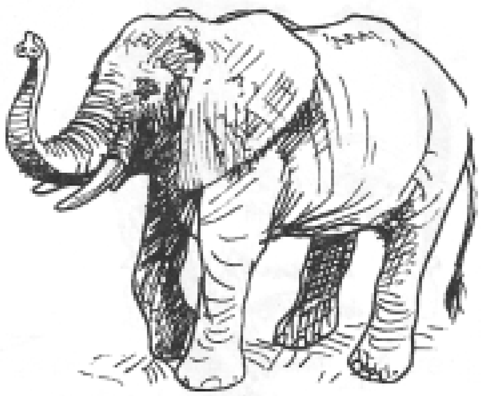
The Ostrich

who buries his or her head in the sand and refuses to face reality or admit there is any problem at all.



The Monkey

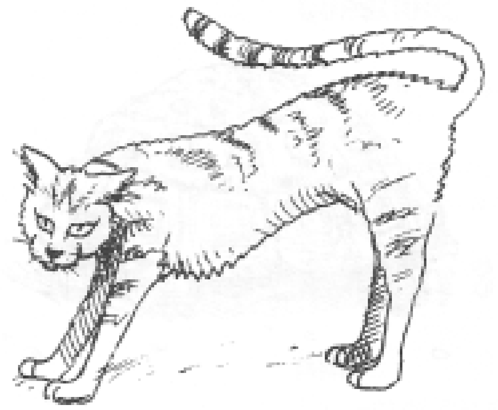
who fools around, chatters a lot and prevents the group from concentrating on any serious business.



The Elephant

who simply blocks the way, and stubbornly prevents the group from continuing along the road to their desired goal.

Sheet 2

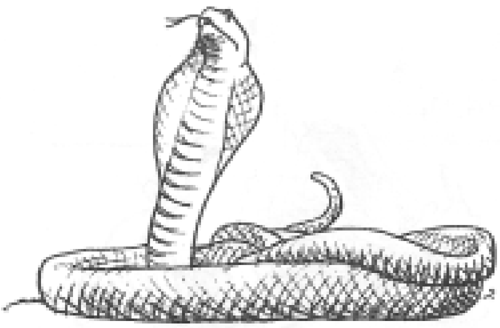


The Cat

who is always looking for sympathy. 'It is very difficult for me ... miauw ... '

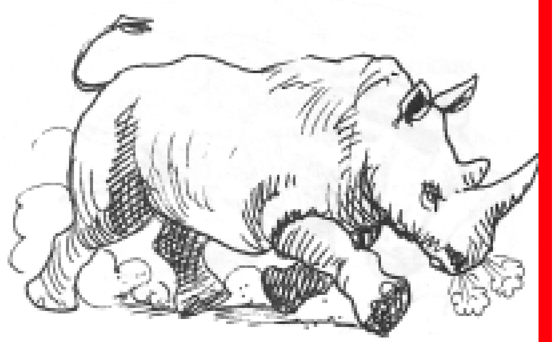
The Peacock

who is always showing off, competing for attention. 'See what a fine fellow I am!'



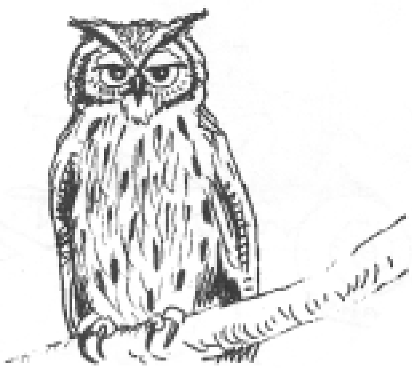
The Snake

who hides in the grass and strikes unexpectedly.



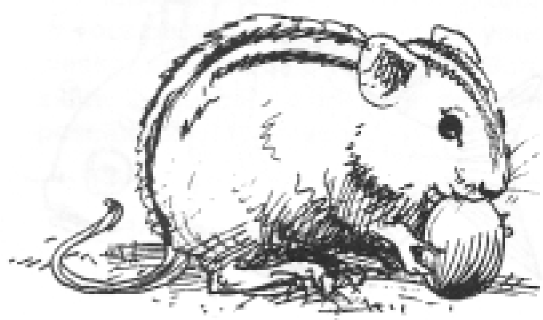
The Rhino

who charges around 'putting her/his foot in it', and upsetting people unnecessarily.



The Owl

who looks very solemn and pretends to be very wise, always talking in long words and complicated sentences.



The Mouse

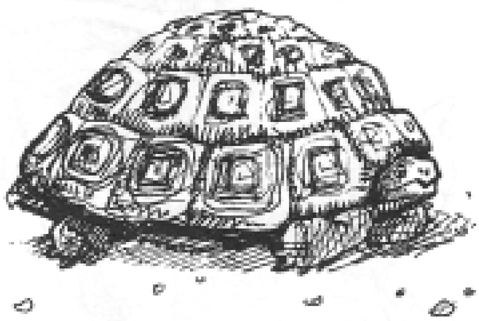
who is too timid to speak up on any subject.

Unhelpful behaviours in a group continued

Sheet 3

The Giraffe

who looks down on the others, and the programme in general, feeling, '1 am above all this childish nonsense.'

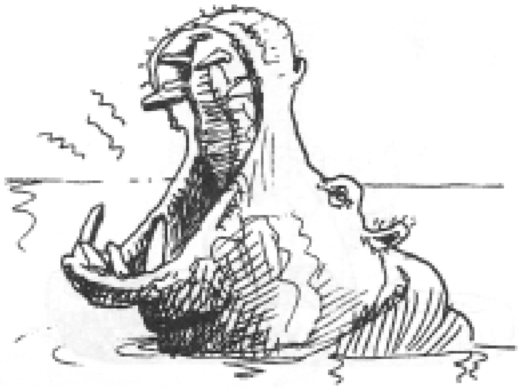


The Tortoise

who withdraws from the group, refusing to give his or her ideas or opinions.

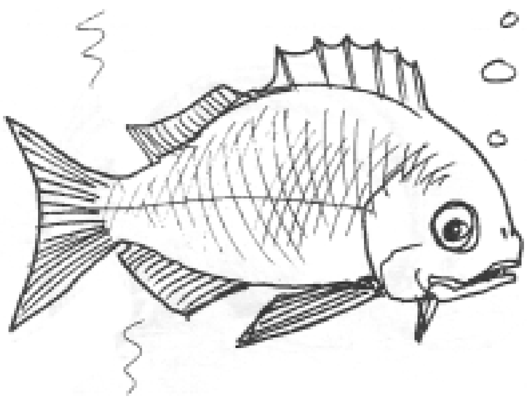
The Frog

who croaks on and on about the same subject in a monotonous voice.



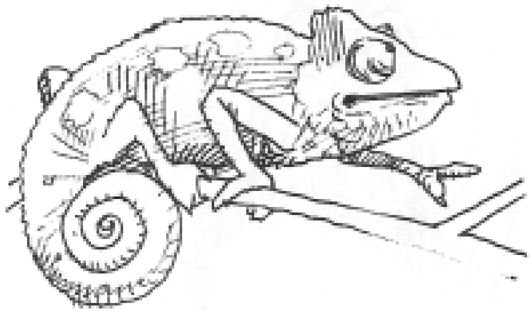
The Hippo

who sleeps all the time, and never puts up his head except to yawn.



The Fish

who sits there with a cold glassy stare, not responding to anyone or anything.



The Chameleon

who changes colour according to the people she is with. She'll say one thing to this group and something else to another.

MODULE 4

Reflect
Principles and Values

There are certain principles and values which *Reflect* practitioners at all levels draw on as an essential part of undertaking a critical analysis of their environment. These principles help us to develop political perspectives needed to gain insight into social and cultural issues as well as important concepts in development. **MODULE FOUR** will facilitate a more complex understanding of *Reflect* principles and how they can be applied in our various situations in order to sharpen our critical analytical skills.

- What are the basic principles and values of Reflect? What are the most important concepts of the Reflect learning process?
- What do we need to know to sharpen our critical analytical skills?
- How can we help participants to understand and redefine power relationships to develop their own understandings of local and global realities?

Learning objectives:

In this module we will:

- Revise the most important concepts of the *Reflect* learning process, as well as the core principles of *Reflect*
- Deepen our understanding of power and gender relations as key elements of *Reflect*
- Reflect on our experiences as we form a critical analysis of our own learning environment
- Draw on this analysis to gain a deeper understanding of our own local and global realities
- Strengthen our critical thinking skills as we evaluate the day

Recapping our understanding of the *Reflect* principles and process

As experienced practitioners, you already have a good understanding of the core *Reflect* principles and the *Reflect* process. However, we will remind each other of these by making short presentations.

Activity 1

Reviewing our knowledge of *Reflect* through presentations

Purpose:

- To remind ourselves of what we know about the *Reflect* principles and learning process
- To share our understandings and experiences with one another

What you need:

✓ Flipchart paper

✓ Koki pens

What to do:

- Ask participants to work in pairs or small groups (if possible with people from the same organisation or context).
- On a flipchart, ask each group to draw a picture of the *Reflect* learning process as they understand it.
- Ask each group to write down at least 5 key principles of *Reflect* as they understand them.
- Ask each group to write down (or illustrate) at least 3 key ways in which *Reflect* is being applied and used in their context.
- When groups have finished the task, ask for each group to display their flipcharts and give participants a chance to walk around and view each others' work.
- Ask for volunteers who wish to present their diagrams or principles or experiences and understandings of *Reflect* to the plenary group.

Questions for discussion

- Were there differences between the different diagrams of the *Reflect* learning process? If so what were these? (Discuss whether the differences are valid or not.)
- Do you think all the basic *Reflect* principles were addressed by the different groups or were there some that were not mentioned?
- Are there ways in which *Reflect* is being used by other groups that you had not thought about? Can you draw on others' experiences to inform your own work? In what ways?
- What of this will you share with facilitators when you train them and how?

Sharpening our critical skills through a closer examination of POWER

> "If we cannot talk about our own power – directly, personally and self-critically – we have no right to encourage others, whether communities or marginalised groups, to use power analysis as an underpinning of a rights-based approach. … Unless we are sensitive to power ourselves, we cannot promote a truly rights based approach in our work."
>
> *Transforming Power* www.reflect-action.org

Activity 2 **Power Flower**[1]

Purpose:

- To develop participants' understanding and awareness of different sources and forms of power (which is a central tenet of *Reflect*)
- To provide an opportunity for participants to reflect on and become more aware of their own relationship to different forms of power in society
- To gain insight into other people's experience and perceptions of power

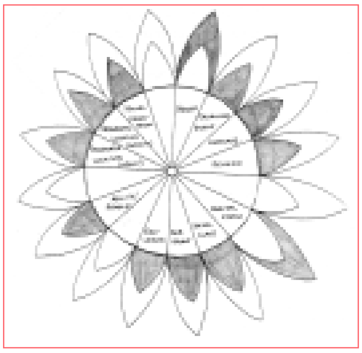
What you need:

✓ A 'power flower' worksheet for each participant (on page 40)

✓ Crayons or pencils

[1] This exercise has been adapted from the Power Flower exercise used in ELRU's anti-bias workshops. See *Shifting Paradigms*: Using an anti-bias strategy to challenge oppression and assist transformation in the South African context. Early Learning Resource Unit, 1997.

The Power Flower



What to do:

- Give each participant a 'power flower' worksheet and crayon or pencil.
- On the inner petals of the flower, fill in the group you believe holds the power or is dominant in each category. For example, for the category of 'sex', you would fill in 'men' on the inside petal. Also write in the group you think is oppressed or less advantaged on the outer petal. For example, you would fill in 'women' on the outside petal of the category 'sex'.
- Now ask the participants to colour in the petals of the flower according to their own identity and whether they are in a position of power (inside petals) or outside of a position of power (outside petals).
- Ask participants if there are any other forms of power which are not reflected on the petals (for example, employed and unemployed). If so, they should write these into the blank petals.
- Allow participants 10–15 minutes for this part of the activity.
- Now ask participants to assess the number of areas where they feel they are empowered and the number of areas where they are less empowered or even disempowered.
- In small groups, ask participants to share this information and their feelings about it with the rest of the group. Also ask them to reflect on what the implications of this are for their practice as *Reflect* practitioners. Allow 20 minutes for discussion.

> This is a useful exercise to illustrate how power lies within social categories, like race, gender, class, language, sexual orientation, age, etc.

- Conclude the activity by pointing out that we can use our power constructively to challenge oppression and the way in which power is allocated within society. Indeed, doing so is one of the major principles of the *Reflect* process.

> "Power underlies all human relationships. … Only with a deep awareness of power at all times and at all levels can we use participatory processes effectively."
>
> *Transforming Power* www.reflect-action.org

Activity 3

Mapping power in our learning community

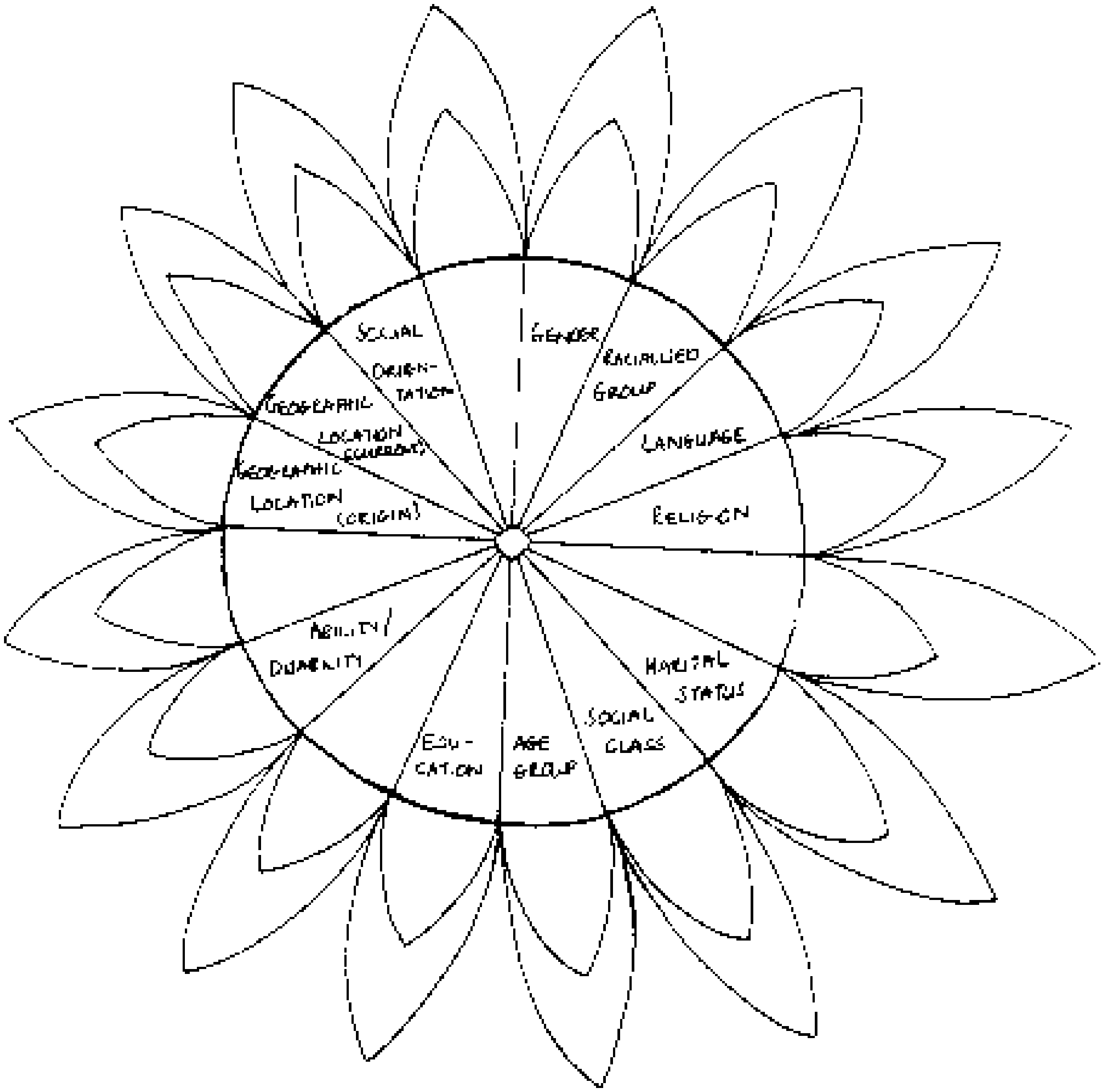
Purpose:

- To encourage participants to reflect on power relations in the context of the training and beyond in order to gain both a micro and macro perspective of power relations
- To develop an analysis of power relations within the context of the training environment

What you need:

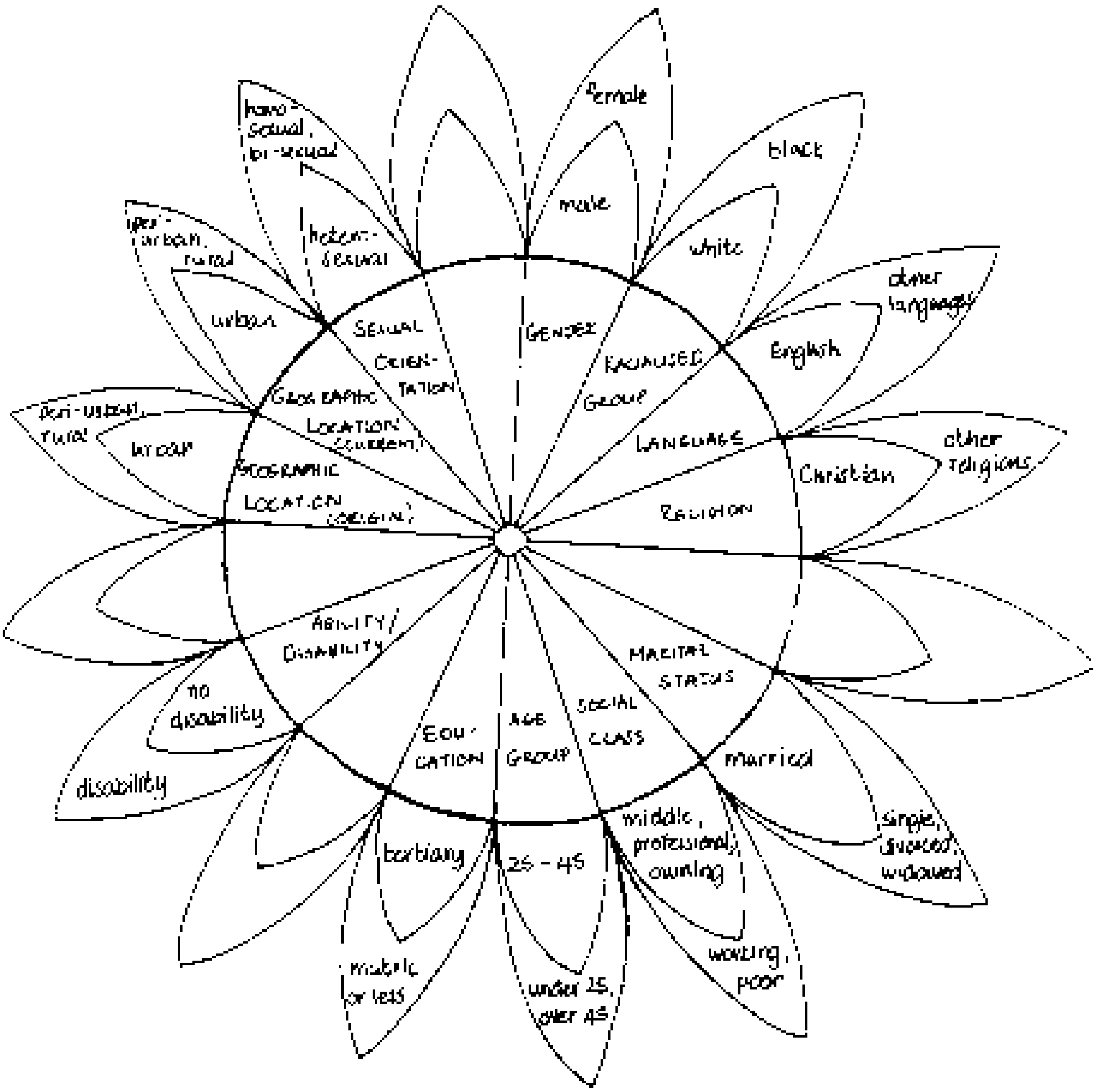
✓ Range of objects (string, bottle tops, chalk, etc.) needed to make a PRA map
✓ Flipchart
✓ Koki pens
✓ Copies of the demographic profile sheet on page 43

Flower Power Worksheet



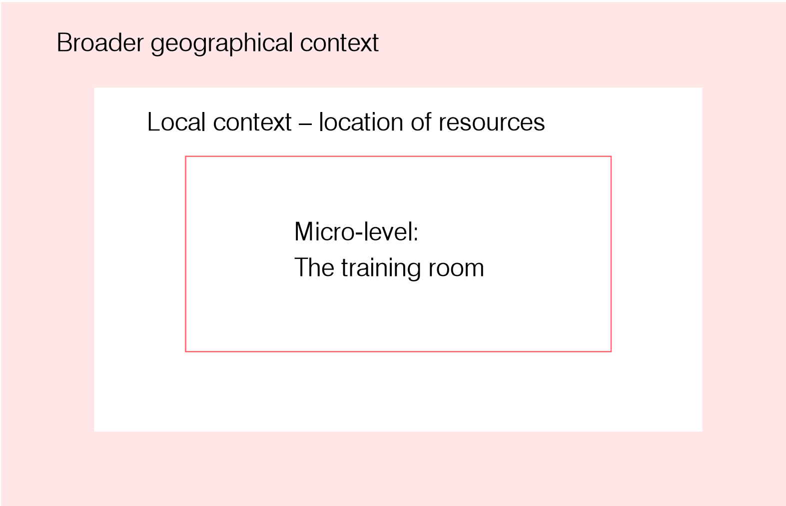
EXAMPLE

How the petals might be completed



What to do:

Ask participants to create a map of our learning community using a variety of objects that have been collected. (The map should provide a broad geographical perspective of where the training venue is in relation to other parts of the country; it should also reflect the local context and show where we are in relation to important resources like shops, telephones, hospitals etc.; and it should show how the participants are positioned in relation to one another at the micro-level of the training room.)



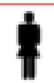
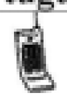
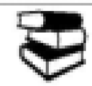
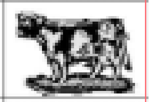
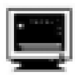
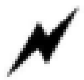
The map should thus reflect three perspectives as illustrated:

- Ask participants to start by locating the training venue in relation to their immediate geographical context and then in relation to the broader geographical context of the country.
- Now ask participants to focus at a more micro-level and show where the venue is in relation to other important local resources such as shops, banks, hospitals, telephones, network coverage, etc. (The group should first decide on what the important resources are.)
- It is now the third day of training, and participants have most likely become used to certain seats or positions within the training room. In order to look more closely at our positions in this new learning environment, make a map of the training room which shows where people are sitting, where the resources are located, where the facilitators are positioned, as well as any other important things that you think should be included on the map.
- Now we want to create a better picture of who we, the participants, are. Drawing on the information learned from the 'Power Flower' exercise fill in the sheet on page 43 which outlines participants' demographic profiles. This sheet will provide information about each participant in the room. Information relates to:
  - Gender
  - Marital status
  - Children
  - Age (define different age groups relevant to the group e.g. >25, 25><45; 45>)
  - Racial group
  - Education level (again, define levels)
  - Social class
  - Language
  - Resources (e.g. do you own a cell phone, a car, a house …)

Ask participants to colour in the block relevant to their own situation. These sheets should be placed in the positions where participants are seated in the room.

Demographic profile

Name: ....

Gender								
Marital Status	Single	Married	Divorced/ Separated	Widow/er				
Children	0	1	2	3	4	5	6	7
Age	<25	>25	<35	>35	<45	>45	<55	>55
Racial Group	Black	Indian	Coloured	White	Other			
Education Level	Primary	Secondary	Matric	Diploma	Degree	Masters	PHD	Other
Social class	Working class	Middle	Upper					
Language	English	Sesotho	IsiZulu	IsiXhosa	Tswana	Tsonga	Afrikaans	SePedi
	Portuguese	Shangaan	TshiVenda	SeSwati				
Resources								
								

Questions for discussion

- Based on the picture of our learning community, who do you think has most access to resources? Why/what gives them this access?
- Why are some factors more powerful than others (e.g. certain kinds of knowledge; a particular gender or language, etc.)?
- Do we choose the factors that determine allocation of power or do some of them choose us (e.g. race, gender, class)? If there are choices to be made, what are those choices?
- Is this allocation of power fixed or can it be changed? If it is fixed, who fixed it? If it can be changed, how can this happen?
- Have these factors changed over time? Are they likely to change over time?
- How can we as *Reflect* practitioners best use our power?

Activity 4 Power lines [2]

Purpose:

- To encourage participants to reflect on power relations in the context of the training
- To develop an analysis of power relations within the context of the training environment

What you need:

✓ A pot or bowl which symbolises the source of power in the room

What to do:

- Place a pot symbolising power in the middle of the room.
- Ask participants to decide how much power they feel they have within the group, and place themselves in relation to the 'power pot' accordingly.
- They should then make one line leading away from the pot, with the most powerful person nearest the pot, and the least powerful person at the end of the line.

Debriefing and questions for discussion

- Who was the most powerful person and why? (How do the 'most powerful' people respond? How did they feel?)
- Do you agree with the way that people arranged themselves?
- How does it feel to talk about power?
- What gives some people more power than others? (Think about the constructions you analysed in the Flower Power exercise, but also about who has what kinds of knowledge because knowledge, like wealth, is power. However, both knowledge and wealth are also social constructions.)
- What kind of observations can be made about power from the process and from looking at who is where along the power line?
- Why is it important that we as practitioners are aware of power dynamics?
- What can/should we be doing about them?

[2] This exercise is adapted from an exercise performed at a CIRAC (Circle for International *Reflect* Action and Communication) meeting in Johannesburg in 2002

> "When we are in a position of power, we often deny it, feeling ashamed of it. If we deny our power, it does not go away. We must recognise it if we are to transform it positively."
>
> *Transforming Power* www.reflect-action.org

Activity 5

Timeline

Purpose:

- To look at the ways in which values and institutions have changed over time
- To deepen participants' awareness that certain problems are socially constructed in accordance with a particular time and context, and that change can be effected by people who choose to act to effect change

What you need:

- ✓ PRA cards
- ✓ Koki pens
- ✓ String or chalk to draw a timeline

What to do:

- Prepare everything you need to start (koki pens, PRA card, string, etc.).
- Explain to participants that you will be constructing a timeline that will help them to examine how ideas and institutions related to 'race' and/or gender have changed over the years.
- Ask participants to think of a month and/or year when they remember an important event or incident related to 'race' and/or gender.
- Write this date on a PRA card. On a separate card, ask someone to illustrate or write the event or a symbol for the event. (If you use symbols, be sure to make a note about what the symbol means.)
- Continue to ask for more dates and events; don't worry if they are not in order – you can always rearrange these later.
- Encourage participation and don't let one person dominate. Ask different people questions about the history of racism and/or sexism in South and southern Africa.
- Continue until the group has constructed a picture which shows how the idea of race and racism and/or gender and sexism has changed over time in the south and/or southern African context.

Questions for discussion

- How have ideas about race and gender changed over time?
- What institutions have changed?
- How did these changes come about? (Who planned things and why?)
- What organisations or major players were involved? Who contributed in what ways?
- Are all of these organisations/players still around?
- What have the changes meant for the life we live today?
- Are there certain groups/cultures that are still more privileged than others?
- What changes do you think are still needed to create a better life for all?

NB: You can use a timeline to trace changes related to any major social problem (such as economic poverty, class divisions, HIV and AIDS, or gender-based violence).

Make sure that the following points have been considered during discussion of activities:

Basic principles and values related to *Reflect*

- ✓ Power is relational – how much power we have is related to how and where we are positioned in society – different positions give us (or deny us) access to different kinds of power. This can help us to understand why certain marginalised groups and communities are disempowered.
- ✓ It can be problematic when there are inequalities in power because this can lead to oppression. When people have power at the expense of others, the group with power tends to dominate since they have access to material resources, and influential institutions in society such as education, law, government, etc. The ideas and beliefs of the powerful group become dominant in ideology, and ideology will support their superior status.
- ✓ Power is however negotiable, as are different positions in society. The power, positions and processes we take for granted today have evolved and changed over time and will continue to do so. Society and people can change as social constructions change.
- ✓ It is important for *Reflect* practitioners to realise that power can be re-allocated and change can be effected through our efforts and actions. We should explore how we can best utilise the power of poor people, women and marginalised groups for transforming given power relations.
- ✓ Knowledge and power are intimately related. Both are socially constructed and it is important to analyse who has access to what type of knowledge in the given power structure, and also whose knowledge has been recognised and whose not. And, why so? What type of knowledge can most help marginalised groups access power, and how can they obtain that knowledge?
- ✓ Gender sensitivity is a key principle in the *Reflect* process. Gender discrimination is a socially constructed problem and can therefore be changed as we think about and change the way we relate to each other in society. We need to consider gender in both behaviour and analysis of social issues.
- ✓ Cultural sensitivity is another key *Reflect* principle. We need to challenge the ways in which cultural domination and co-option happen as we consider and recognise the diverse cultural realities that characterise our contexts.

NB Also refer to handout 'The Theory and Methodology of *Reflect*' which will remind you of the basic *Reflect* principles which you already know (see next page).

The Theory and Methodology of *Reflect*

By fusing the theories of Brazilian educationalist Paulo Freire with the methodologies of participatory rural appraisal (PRA), *Reflect* seeks to link the engagement of people in wider processes of development and social change with the learning of literacy and other communication skills. These skills include: reading and writing, listening and speaking, numeracy, language capacity, knowledge of different and specialised jargon, and access to and understanding of different technologies (e.g. computers) and media (e.g. radio, television). *Reflect* can thus be described as a structured participatory learning process that facilitates people's critical analysis of their own environment and issues while placing empowerment at the heart of a sustainable development process. ***Reflect* incorporates 9 core principles, which are listed below:**

1. **Power and Voice**

   Reflect is a process that aims to strengthen people's capacity to communicate by whatever means of communication are most relevant or appropriate to them. Although part of the process may involve learning new communication skills, the focus is on using these in a meaningful, practical way.

2. **A Political Process**

   Reflect is premised on the recognition that achieving social change and greater social justice is a fundamentally political process. It is not a neutral, short-term approach, but rather seeks to help people in the struggle to assert their rights, improve their socio-economic and political position in society. As such, it requires us to work with the poorest and most marginalised people.

3. **A Democratic Space**

   Reflect involves creating a democratic space where everyone's voice is treated as equally important. This can challenge local culture where power relationships and stratification have created inequality. It is not easy to achieve this, but it should be a constant focus.

4. **An Intensive and Extensive Process**

   Reflect is rarely a short or one-off process. Groups usually meet for about two years, and sometimes indefinitely. Generally, groups meet twice a week for two hours. The intensity of contact is essential for a process that seeks to achieve social or political change.

5. **Grounded in Existing Knowledge**

   Reflect begins with respect and value for people's existing knowledge and experience. However, this does not mean accepting people's existing opinions or prejudices without challenge particularly where these contradict the principle of creating a democratic space. Moreover, there is always part of the process where participants are enabled to access new information and new ideas from new sources. The key is to give people control over that process, and con-fidence, so that they can be critical and selective.

6. **Linking Reflection and Action**

   Reflect involves a continual cycle of reflection and action. It is reflection for the purpose of change, and action linked to reflection, as pure activism rapidly loses direction.

7. **Using Participatory Tools**

   The *Reflect* process uses a wide variety of participatory tools to help create an open, democratic environment that enables everyone to contribute. Visualisation techniques such as maps, calendars, diagrams, matrices and other graphics provide a structure for the process. Many other participatory methods and processes are also used, including theatre, role-play, song, dance, video or photography.

8. **Power Awareness**

   All participatory tools can be distorted, manipulated or used in exploitative ways if not linked to an awareness of power relationships. Within *Reflect* groups, all relationships must be equitable, and structural analysis is needed to ensure that issues are not dealt with at a superficial level. Only through such analysis can effective strategic actions be determined.

9. **Coherence and Self-organisation**

   Reflect needs to be used systematically, and the focus of the process should always be towards self-organisation, so that groups are self-managed, where possible, rather than being facilitated by, or dependent on, outsiders.

Exercise to consolidate learning

- How can you integrate what you have learned today into a learning programme for facilitators that you train?
- What learning objectives will you include?
- What learning activities will you include?

Evaluation of the day: Evaluation line

Purpose:

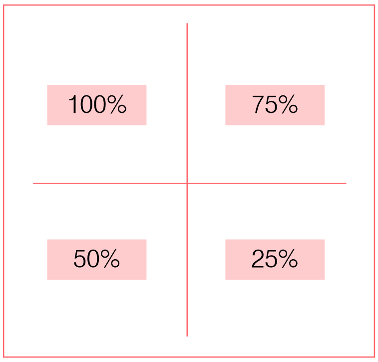
- To give participants an opportunity to reflect on their understandings of the day
- To provide an opportunity for participants to give feedback on the usefulness of the day

What you need:

- Beans/matches/other tokens (e.g. stones)
- String or chalk

What to do:

- Have a number of beans or matches or other tokens on hand. There should be 4 for each participant.
- Draw a quadrant on the floor using string (or chalk if the floor surface allows).



- Explain to participants that they will use their bean to show how they understand or feel about different aspects of the day. By placing their beans in certain positions in the quadrant on the floor, they will show how they feel about the question asked. The quadrant has four percentage options as illustrated.
- Ask the following questions and after each question, participants should place their tokens in the quadrant they feel best represents their answer:
  1. To what extent do you feel you have improved your awareness and understanding of the notion of power as a core principle of *Reflect*?
  2. To what extent do you feel that the mapping tool helped you to understand the power dynamics in the group?
  3. To what extent do you feel that the timeline activity helped you to heighten your awareness of race and gender as social constructs that can change over time?
  4. To what extent do you feel that what we have done today will help you sharpen your critical analysis in the field?
- Count the number of beans in each quadrant after you have asked each question, and make a note of the number.
- Collect the beans and ask the next question, repeating the process until you have asked all questions.

Baseline Studies

MODULE 5

We now have a good understanding of what our responsibilities are as trainers, of how adults learn and the core principles of *Reflect*. The aim of **MODULE FIVE** is to draw these understandings together as we think about how we can improve our practice in the field. We will reflect on how to collect baseline data that will provide us with the insight we need to build a relevant and significant learning programme for the facilitators and participants with whom we work.

Learning objectives

In this module we will learn about:

- What baseline information is
- Why and how we should collect baseline data
- How we should use baseline data to inform the development of a *Reflect* learning programme for the contexts in which we work
- Critical reflection skills as we evaluate the week

- What is baseline data and why do we need it? How do we design a baseline study?
- How do we collect baseline data? What tools do we need?
- Who collects the data and how do we equip these people to do so?
- What do we do with the data that is collected? What are monitoring indicators?
- How do we develop agreed indicators of progress with community members?

What is baseline data?

Discuss in pairs what you understand by 'baseline data'

Baseline data helps us to know where we are now. If we know where we are starting from, it helps us to know where we are going to and how far we have come in the future. Baseline information thus provides us with reference points for our learning and development journey.

But we need to think clearly about these reference points, as these are the points which we will constantly refer back to. For example, if we want to know how *Reflect* has helped people to improve their literacy skills, but we forget to assess their literacy skills at the beginning of the programme, it will be hard for us to know how much they have learned during or after the programme.

Activity 1 | Case study

Purpose:

- To test our understanding of baseline data by applying what we know to a practical situation

What you need:

✓ A copy of the case study and questions
✓ Flipchart
✓ Koki pens

CASE STUDY

You are working with a rural group of farmers who want to use *Reflect* to help them improve their livelihoods as farmers so that they can provide better for their families. The farmers currently have cows and are growing maize which is eaten not only by the cows, but also by the farmers' families. The farmers have never learned to read or write, and as a result, they don't keep a record of how much maize is eaten by the cows or by their families. They also don't budget and as a result, sometimes run short of fodder for the cows. They also struggle with growing the maize – sometimes only half the crop comes up. They are not sure why this is the case, but suspect it may be because the soil is very poor.

What to do:

Working in small groups, discuss the following questions.

- What baseline information do you need to know about the farmers now in order to assess whether they have been able to improve their livelihoods in the future?

  (How do the farmers make their livelihoods now? What problems are they currently experiencing? What are they doing about these problems at the moment? Are they using literacy in any ways? If so, how? What are their levels of literacy and numeracy now? Can they budget? What do farmers know now about raising cattle and about soil nutrition? What do they feel they still want to know/learn?)

- What baseline information do you need to know about the farmers' families now to assess whether their participation in the *Reflect* programme will make a difference to them in the future?

  (How much income does farming currently provide for the family? Are there other sources of income for the family? How healthy are family members now?)

- What baseline information do you need to know about the cows now in order to know in the future whether the farmers' participation in the *Reflect* programme has made a difference to their farming practices?

  (How many cattle does each farmer have? What is the health of these cattle like? How old are the cattle? What are these cattle used for? What and how much do the cattle eat? How do the farmers currently fertilise the soil? What access to water do farmers have? Where and how is maize currently stored?)

Responses

Once your group has reached consensus, note your response to the questions on a piece of flipchart paper.

- Present your thinking to the plenary group for discussion.

Designing a baseline study

Activity 2

Purpose:

- To encourage participants to think about what is involved in collecting baseline data
- To help participants understand what an *'indicator'* is
- To expose participants to a variety of tools that can be used to collect baseline data
- To introduce the idea of secondary data and help participants understand how this might be useful to them

What you need:

✓ Flipchart

✓ Koki pens

What to do:

- In pairs:
  - Discuss your understanding of an *'indicator'*.
  - Within the context of conducting a baseline study, what is your understanding of an *'indicator'*?
- Read the scenario below and then work in small groups to complete the task:

Scenario

You are living in a community which is ravaged by HIV and AIDS. Members of the community want to use *Reflect* to help them deal with this epidemic. In order to know whether they are making progress, they need to collect information that will give them a good picture of the community now.

Think about how you will help them to collect relevant information by answering the following questions:

a. What are the most important HIV/AIDS related issues in the community?

(Remember that you cannot collect information about everything – you need to select specific areas of focus. For example, you might want to focus on home-based care, or orphans, or access to treatment or testing, or services provided, etc ...)

b. What *indicators* will you define in relation to each of the areas of focus you have selected? (For example, if you want to know about access to testing, you will need to count the number of people who have and have not tested; if you are interested in orphans, you may need to know how many orphans there are and how many of them are living alone or being cared for; if you are interested in services, you will need to know who is providing what service …)

c. What PRA tool/s will be useful to help you and the participants to gain a better understanding of the context?

> Refer to the Resources section (at the back of this guide) which tells you more about mapping as a tool used to collect baseline data.

d. Make a rough sketch of the tool/s (drawing on what you know about HIV/AIDS in your own context).

e. Is there any other *secondary data* that could also be used to give you an idea of the present situation? (Secondary data is data that you get from records rather than directly from the people you are working with. It could be reports/records from the health clinic/statistics from the community health workers, etc.

f. Who will you collect the information/data from? (What will be your sources of data?)

- Present your thinking to the group for further discussion.

Make sure that your discussion has considered the following points:

> ✓ An indicator is exactly that – an indicator. It gives you a signal or clue or indication about something. For example, the fuel gauge in a car is an indicator of how much fuel is in the petrol tank.
>
> ✓ Secondary data is data that you collect from secondary sources, not your main – or primary – source (which is usually the people with whom you are working). Secondary data might take the form of statistics or records or reports or other documents.

> The table on page 53 can help you to decide on the main issues and information related to these issues: the indicators, sources of information (primary and secondary), ways in which you might collect the data, and ways in which you might record your findings.

Activity 3 Preparing for the Fieldwork Assignment

Purpose:

- To ensure that participants understand what is required of them as they undertake the assignment designed to consolidate learning between the two training blocks.

What you need:

✓ Copy of the assignment sheet on page 54

What to do:

- Read through the Assignment sheet noting any areas of concern or confusion
- Discuss the Assignment sheet as a group, seeking clarification to any questions you may have.

Collecting Data

Issue	Information needed	Indicator	Sources of information	Tool/method	Findings
Orphans orphans in the	Prevalence of orphans records from the	Number of households where village	Community members; orphans live health centre	Map of the community showing	
Income and expenditure flows	Source of income, amount of income, sources of credit, types of expenditure	Amount of money coming in/going out	Community members, written budgets	Income/expenditure tree	
Farming/ agriculture	Land use	List of different ways in which land is used	Farmers/community members; government reports	Preference ranking matrix	
Natural resources	Sources of water	Number of sources of water	Community members; information from government dept.	Natural resource map showing water sources, areas of deforestation	
	State of deforestation	Area of deforestated land	Community members, government reports		

Reflect TOT COURSE

Assignment

As a trainer of facilitators, one of your key responsibilities is to assist your facilitators to work effectively with their *Reflect* circles. This means helping them to understand the contexts in which they work, as well as the issues and problems they face, and how to approach these issues.

Collecting baseline information is a critical step in the process of understanding the community's situation better. Baseline data is also important to help you to design and develop the learning curriculum (facilitators' manual) for your *Reflect* circles. Furthermore, it will provide benchmark data for monitoring and evaluation purposes.

This assignment will help you to collect baseline information about the communities you work with. It will also assist you to put into practice what you have learned in the first block of the TOT training.

The task has two areas of emphasis: *content and process*. You will be required to demonstrate what you have learned from the training in both these areas as you complete 4 major tasks which are as follows:

A. To plan and conduct a workshop about baseline data with your facilitators
B. To assist and shadow your facilitators in the field as they collect baseline data
C. To analyse the baseline data collected
D. To prepare your presentation

The questions below will help you to go about these tasks in a more structured way:

1. Prepare a workshop that you will conduct with your facilitators. During this workshop you will:
   - Welcome and brief your participants about the workshop (see Module 1).
   - Introduce your facilitators to the concept of a baseline study. Explain what baseline data is and why it is important (see Module 5).
   - Prepare your facilitators to select focus areas (you need to know what kind of information you are going to collect – e.g. is it about livelihoods or about natural resources or about infrastructure?).
   - Prepare your facilitators with the knowledge and skills needed to conduct a baseline study.
   - Help them to understand process issues (i.e. facilitation skills – this is not only about content, it is also about process.)

NB: You are required to submit a copy of your facilitator training workshop plan to _____________ by no later than ____________________.

You will receive feedback on your proposed plan from ____________________ by ____________________.
Note that it will not be possible to provide feedback on any plans submitted after the due deadline.

2. Follow your facilitators into the field and observe the following as they conduct their baseline studies:
   - How did facilitators interact with their participants? (See Module 3).
   - What good and what bad facilitation skills did they demonstrate in the field?
   - What skills do you think need improving?
   - How would you advise that these skills be improved?

- What *Reflect* principles did you observe being practiced by your facilitators? (See Module 4).
- In what ways did you practice *Reflect* principles in your interaction with facilitators?

3. Analyse the data you have collected by:
   - Identifying the key issues that emerged in each of the contexts.
   - Summarising the data that emerged in relation to each of these key issues.
   - Identifying the problems that emerged in each of the contexts.
4. Prepare to present your data to the group at the beginning of the second block of training. (Try to organise your data by using a PRA tool such as a matrix, or Venn diagram or other tool.)
5. Also prepare to present your observations related to question 2 above. Make sure you have organised your points clearly for this presentation.

NB: You should shadow at least 3 facilitators in the field and your presentations should be based on the data collected from these baseline studies. (If you are able to shadow more than 3 facilitators, please feel free to do so!)

When you return for the next module of this course, you will present your work to the group who will use a prepared sheet (see next page) to provide you with some feedback on your presentation. Have a look at this feedback form as it might help you to prepare and plan your presentation.

BASELINE STUDIES PRESENTATIONS

Feedback Form

To assist your colleagues, please take a few minutes to complete the following form about their presentations. Your comments will help your colleagues to evaluate how they performed and know where they might improve further. Please circle your appropriate answers.

Name of Presenter: ....

Name of Evaluator: ....

KEY: 4 =definitely agree, 3 =agree, 2=disagree, 1=definitely disagree

CONTENT

The presentation:

1)	highlighted key issues that emerged from the study	4 3 2 1
2)	summarised data in relation to each key issue	4 3 2 1
3)	explained how the facilitators performed	4 3 2 1
4)	explained how facilitators can improve their skills	4 3 2 1
5)	explained how *Reflect* principles were used	4 3 2 1

PRESENTATION

The presentation:

1)	was clear and easy to understand	4 3 2 1
2)	was audible (easy to hear)	4 3 2 1
3)	made good use of visual materials	4 3 2 1
4)	was well organised	4 3 2 1

OTHER COMMENTS

____

____

____

____

Evaluation of block one of the TOT: Evaluation worksheet

Purpose:

- To give participants an opportunity to reflect on their experiences of block one
- To provide an opportunity for participants to give feedback on block one of the TOT

What you need:

- A copy of the evaluation form for each participant (see pages 57 and 58)
- Pens for each participant

What to do:

- Hand each participant an evaluation form to be completed.
- Allow between 20 and 30 minutes for the participants to fill in their forms.

Reflect TRAINING OF TRAINERS (TOT)
Block One

Evaluation Form

1. What did you think of:
   a) the content of block one?

   b) the facilitation?

   c) the activities?

2. What were the most important things you learned during block one?

3. Comment on:
   a) the presentation and usefulness of the handouts/learning materials

Reflect TRAINING OF TRAINERS (TOT) – **Block One continued**

b) level of materials and discussion (too easy/too difficult)

c) time allowed for discussion

d) time allowed for reflection

4. What would you change about block one? Please suggest alternatives.

5. Were you catered for well in terms of food and accommodation?

6. Do you have any suggestions or comments for consideration in relation to the next training block?

Presenting and Analysing Baseline Data

MODULES 6 & 7

Having gathered baseline data from our respective communities, we will now present these data and analyse them. This will help us build a foundation for a relevant and significant learning programme, as well as a monitoring and evaluation programme. In **MODULES SIX AND SEVEN** we will not only think about the kinds of information collected, but also the process we followed when collecting our baseline information. We will also think about presentation skills – important skills for trainers to master. And of course we will improve our analytical skills as we engage in a critical analysis of the data collected by ourselves and our colleagues.

- What are the different ways in which baseline information can be collected?
- What are the best ways to present baseline information?
- How do we make sense of this information?
- How do we analyse baseline data?
- How do we make sure that the issues we identify are real and relevant to the communities we are working with?

Learning objectives

In this module we will review and learn about:

- *Reflect* principles and facilitation skills as we listen to our colleagues' experiences in the field
- Different ways to collect baseline information
- Different ways to present baseline information
- How baseline data can be analysed
- How to make sure that baseline data collected is real and relevant to the communities we are working with
- Critical reflection skills as we constructively evaluate each other and the day's activities.

Activity 1

Presenting baseline information and findings

Each participant will have an opportunity to make a presentation to the group. While they are presenting, those in the audience should think about the following issues and questions as their colleagues make their presentations: (Write these onto flipchart so that they are visible during the presentation to remind the audience of what to watch out for.)

1) ***Process issues – How*** did facilitators conduct their baseline studies?
   - How did facilitators interact with their participants in the field?
   - What good and bad facilitation skills did they demonstrate?
   - What skills can be improved and how might this be done?
   - What *Reflect* principles were practised by facilitators and by the presenter?

2) *Content issues* – *What* baseline information was collected?

- What key issues or problems emerged?
- Which indicators were used? Were these appropriate for the data collected?
- Which sources of information were consulted?
- What data related to the key issues became known?

Activity 2

Evaluating presentations

It is important that we receive feedback on what we do. Feedback helps us to improve our skills and become better practitioners. While you listen to your colleagues' presentations and think about the questions above, you will also complete a brief evaluation form (see page 61) which will provide your colleagues with some feedback on their presentations. (Remember to keep in mind the questions listed under Activity One as you fill out the evaluation forms for your colleagues.) Also remember that the purpose of this evaluation form is to provide constructive feedback to colleagues to help them improve their skills. Under the 'COMMENTS' section, you can make suggestions for how you think your colleagues might improve their skills.

Activity 3

Reflection and discussion:

Thinking about presentation skills

- Which presentations stood out and why?
- What interesting tools were used to present data? Why did these tools catch your interest?

Thinking about the practice

- What different methods were used to collect baseline information?
- Which of these were most effective and why?

Make sure that your discussion has considered the following points:

Good presentations:
✓ are audible
✓ are to the point, rather than long and wordy
✓ present information clearly
✓ use interesting and legible visual aids to illustrate the information presented

There are different ways to collect baseline information, including:
✓ maps
✓ Venn diagrams
✓ mobility maps
✓ income and expenditure trees
✓ matrices

The best tool to use will be determined by the kind of information you are collecting.

BASELINE STUDIES PRESENTATIONS

Feedback Form

To assist your colleagues, please take a few minutes to complete the following form about their presentations. Your comments will help your colleagues to evaluate how they performed and know where they might improve further. Please circle your appropriate answers.

Name of Presenter: ....

Name of Evaluator: ....

KEY: 4 =definitely agree, 3 =agree, 2=disagree, 1=definitely disagree

CONTENT

The presentation:

1)	highlighted key issues that emerged from the study	4	3	2	1
2)	summarised data in relation to each key issue	4	3	2	1
3)	explained how the facilitators performed	4	3	2	1
4)	explained how facilitators can improve their skills	4	3	2	1
5)	explained how *Reflect* principles were used	4	3	2	1

PRESENTATION

The presentation:

1)	was clear and easy to understand	4	3	2	1
2)	was audible (easy to hear)	4	3	2	1
3)	made good use of visual materials	4	3	2	1
4)	was well organised	4	3	2	1

OTHER COMMENTS

Analysing Baseline Data

Discuss in groups:

- Now that you have collected all your baseline data – what next? What will you do with this data?
- What are some of the ways in which you can analyse this data?

Activity 4

Clustering problems

Purpose:

- To think about what to do with baseline data once you have collected it
- To strengthen our understanding of how to analyse baseline data so as to improve our projects in the future

What you need:

✓ Data that has been gathered (as part of the assignment)
✓ Cards
✓ Flipchart paper
✓ Koki pens

What to do:

During this exercise you are going to use the different data that emerged from the various contexts in which your colleagues work. Imagine you are pulling this information together to help inform you of the key issues that need to be addressed by a *Reflect* programme you are designing.

1. Each person (or organisation) should write at least 3 but not more than 5 key issues that emerged from their baseline study onto card.
2. These cards should be laid out on the floor.
3. As a bigger group, identify the key issues that were common between the groups. Are there any areas of overlap or similarity? How and why can these be clustered together?
4. Once issues have been clustered together, give the different groups of issues a heading (for example 'crime' or 'unemployment').
5. If there are links between the different issues, participants should show this by using sticks or string to illustrate the links.

Making sure problems are specific and relevant

It is important that we identify the **real** problems and what is happening as a result of the problem, rather than focus on the absence of a solution. For example, if you identify a problem as **"I don't have a jersey"**, you are not identifying the real problem. The real problem is that "I am cold". And there may be a number of different solutions to that problem: you may get a jersey OR you may build a fire OR you may want to insulate the house.

It is important that we don't focus on the lack of something as the problem as this often stops us from seeing other ways of solving the problem. We limit ourselves by focusing on only one answer or solution.

continued/...

Try to state the problem rather than the absence of a particular solution.

The key question to ask is why?
For example, why is lack of enough clean water a problem?

- If we don't have water to drink or wash with, people use dirty water and *get sick.*
- People are unable to water plants and grow food and therefore have poor *nutrition*.

From this example you can see that there are a number of different problems linked to not having water, namely health problems and poor nutrition. There might be a number of different ways to solve these problems, rather than *just* accessing clean water. For example, people may also want to lobby for better health services and find ways to improve food growing practices.

Be specific – problems should be specifically described.

It is important to be **specific** about a problem if we want to reach possible solutions more quickly. Ask lots of questions to help you understand the problem in greater depth. The wh- questions will help you do this.
For example, if you say that **shops** are a problem, ask lots of **wh-** questions to find the specifics of the problem:

- **What** is the problem with the shops?
- **Why** are people dissatisfied with the shops?
- **What** are people able to buy and not buy at the shops?
- **Where** are the shops? Are they too far away?
- **When** are the shops open?
- **Who** runs the shops?

Asking these questions also helps us to break the problem down into smaller, more manageable pieces. It gives us different ways to consider dealing with the bigger problem.

Remember that asking critical questions is a very important facilitation skill for *Reflect* practitioners. We need to ask lots of probing questions to help us understand the roots of the problem. If we don't do this, it is much harder for us to find solutions.

It is also important that problems are relevant to the community you are working with. For example, sometimes people say "We don't have … (a good clinic)" which may be something that they have heard others in a nearby community discussing. It may not be true for their specific community. It is important to keep your eyes and ears open as you work in communities to make sure that problems are true and relevant for that community.

Make sure the problem is relevant to the community with whom you are working.

Activity 5

Unpacking problems

Group work

Working in groups, look carefully at the problems that have been identified and see whether any of them have been stated as a lack of something. If so, choose 3 of them and unpack what these problems really are. Try to state the actual problem and describe it specifically.

- Ask **why** something is a problem.
- Ask more **wh-** questions to get to the specifics and relevancy of the problem.
- Write your problems and the ways in which you have unpacked them onto flipchart.
- Present your thinking to the plenary.

Prioritising Issues

Once we have a better understanding of the problems we are dealing with, we will be in a better position to take action to address the different problems we face. But it is important to think carefully about which problems are most important and why? In other words, we need to **prioritise** the issues or problems so that we know which one to start with.

It is not easy to agree on the most important problem or the problem that requires the most immediate action. People are likely to have different ideas about where to start or which is the most important issue. If we just discuss it as a circle, it is likely that the most domineering person with the loudest voice will be the one whose opinion counts. To solve this dilemma, we can use the **ranking matrix** tool. This tool gives us a way to discuss problems in relation to one another and so democratically agree on which problems are the most important for the group.

Activity 6

The ranking matrix

Purpose:

- To discuss and better understand those issues highlighted during the baseline study
- To prioritise the issues identified during the baseline study

What you need:

✓ Data that has been gathered (as part of Assignment 1)
✓ Cards
✓ Flipchart paper
✓ Koki pens

What to do:

1. Participants should select five or six key problems from the problem cards they have previously clustered. Write these problems onto new cards, making sure there are two copies of each card.

NB: If participants select a problem like 'poverty' or 'underdevelopment' ask them if this problem is something a community can realistically deal with by themselves at community level. If the problem is too big, ask participants to unpack the problem further using the questioning skills we discussed above.

2. Participants then construct a matrix, placing one copy of the problem card along the top of the matrix. The second copy of the problem card should be placed along the left-hand side of the matrix in the same order as along the top.

3. Participants now begin the process of comparing the problems against each other, discussing which are the most important and why.
   - Begin by identifying those blocks on the matrix where the same cards are compared with each other. Because we cannot compare two things that are the same (we can't compare apples with apples), put a line through these blocks or place a blank card in these blocks.
   - Participants now compare the two different issues along either sides of the matrix, for example 'drugs' and 'poor services'. Participants should discuss the two problems and give reasons why one is more important than the other. Ask which one is more important and why? Ask what the consequences of each problem might be.

	Crime	HIV	Poor services	Drugs
Crime				
HIV				
Poor services				
Drugs				

4. Once participants have finished discussing and comparing the two issues and have agreed on which one of the two is more important to address first, ask them to write that problem onto a piece of card and place it on the matrix in the block that corresponds with the two issues being compared.

5. Continue in this way until all the different problems have been compared.

6. The next stage is to count how many times each problem inside the matrix occurs, and then rank these problems. The most important problem will be the one that occurs most often, and the least important problem will be that problem that appears least often in the matrix.

Looking ahead…

Thinking ahead

Activity7

In buzz groups of 2 or 3 people, think about how we are going to use the information we have gained through ranking. In what ways will this information help us to move ahead with our *Reflect* programmes?

Make sure that your discussion has considered the following points:

- ✓ Once we have ranked the problems, we will have a better idea of which issues require most urgent action and which issues should come in what order. This will help us to design and develop a needs-based learning curriculum (see Module 9.)

- ✓ It is also important to monitor the issues that we have ranked here so that we can assess what has happened with regard to each of these issues. Have we made progress? If so, in what ways? (We will learn more about monitoring and evaluation in Module 8).

Exercise to consolidate learning

- Why is it so important to collect baseline data before one begins a *Reflect* programme?
- How can you integrate what you have learned in Modules 6 and 7 into a learning programme for facilitators?
- What learning objectives will you include?
- What learning activities will you include?

Evaluation of the day

You will find that the trainers of this course have written certain questions on sheets of flipchart which are displayed around the room. Please visit each flipchart and indicate your response to the questions with either:

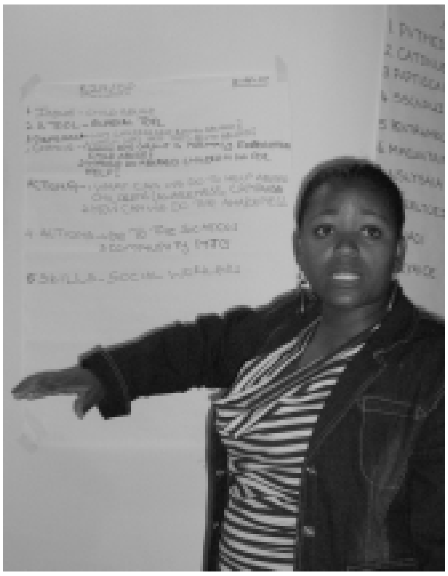
☺ if you agree OR

😐 if you are not certain OR

☹ if you disagree

The questions are as follows:

1) I feel that I learned something from the (i) presentations and (ii) from the feedback provided by my colleagues.



2) I feel that the presentations were too long and boring.
3) I learned more about different ways to collect baseline data.
4) I understand how to analyse baseline data (i) through clustering problems and (ii) through ranking problems.
5) I understand how to unpack problems and make sure they are real and relevant to the community I am working with.

Participatory
Monitoring and Evaluation

MODULE 8

Some time in the future, you will need to revisit the data you collected as part of your baseline study in order to evaluate whether things have changed and if so, how. In the meantime, you will need to conduct monitoring exercises to help you assess the changes on a more regular basis. In **MODULE EIGHT** we will focus on helping you to develop the skills needed to monitor and evaluate *Reflect* programmes. We will examine what we mean by monitoring, (particularly Participatory Impact Monitoring or PIM) and evaluation and think about how we can improve our practice in the field.

- What is monitoring and why do we need to do it?
- Who should take responsibility for monitoring?
- What is evaluation and why do we need to do it?
- Who should evaluate activities?
- How do monitoring and evaluation differ?
- What is Participatory Impact Monitoring (PIM) and how should it be conducted?
- How does it apply in the contexts in which we are working?

Learning objectives:

In this module we will learn about:

- Monitoring: why we should monitor, and who should take responsibility for monitoring activities
- Evaluation: why we should evaluate, and who should take responsibility for evaluation activities
- The difference between monitoring and evaluation
- Participatory impact monitoring (PIM) and the steps involved in PIM
- Critical reflection skills as we evaluate the day

What does monitoring mean?

Let's think more deeply about what is meant by monitoring, why we should monitor, and who should be involved in monitoring.

Understanding monitoring

Activity 1

Purpose:

- To deepen our understanding of monitoring

What you need:

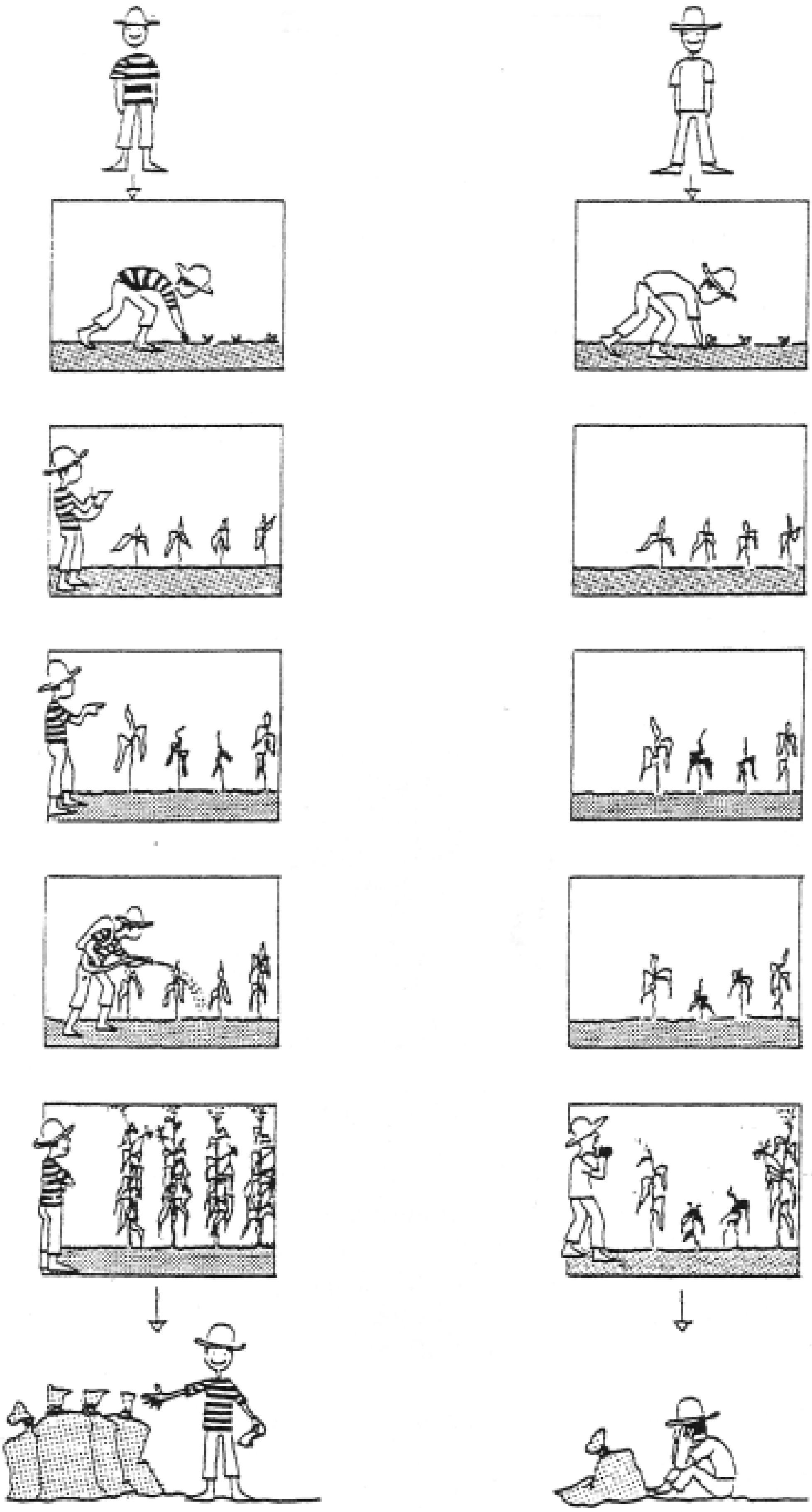
✓ A copy of the picture of two farmers on page 68

What to do:

- Look at the pictures on page 68 of two farmers growing maize.[1]
- Working in small groups, discuss the questions on page 69.

[1] From publication by Dorsi Germann and Eberhard Gohl (1993), *Participatory Impact Monitoring*. GTZ – GATE 2/93. Eschborn, Germany.

Two farmers growing corn



1) What do Farmer 1 and Farmer 2 do differently?
2) What is meant by the term 'monitoring'?
3) What is the purpose of monitoring?
4) Who should carry out monitoring activities and why?

Make sure your discussion covers the following points:

Farmer 1 regularly checks the plants growing in his field. When he notices that some plants are not growing well, he immediately takes care of them and so addresses the problem. His harvest is good and he is satisfied.

Farmer 2 does not look at his plants while his crop is growing. At harvest time he is shocked when he realises that most of his crop has been lost. He is disappointed.

Monitoring is really a very ordinary activity – it involves watching (or **observing**) and thinking about (or **reflecting** on) things or events that are important to the people involved. These things or events might be children growing up, or the weather, or the rate of HIV infection in a community. Monitoring usually also involves taking some form of **corrective action** to adjust things that might not be going so well. The people involved in the activities usually observe better than outsiders, but sometimes an outsider's view is useful too.

The main purpose of monitoring is to **document the impacts** of an intervention, such as the *Reflect* programme, on a group or community. Monitoring the impacts of an intervention is also known as Participatory Impact Monitoring or PIMS.
PIMS helps:
✓ to make sure your activities meet your members needs
✓ to involve members in observations, reflections and decision making
✓ to initiate and reinforce learning processes

Different actors involved in the *Reflect* project will monitor the project in different ways. Members of a circle should monitor their activities, and the development organisations to which they are affiliated should also monitor their activities. The results of the different monitoring activities can be compared which will give everyone a chance to reflect on their observations and assessments, adapt their planning and deepen their dialogue with one another.

What is evaluation?

Now let's think more about what evaluation means, and how this differs (or not) from monitoring. Again we will think about *what* is meant by evaluation, *why* we should evaluate and *who* should be involved in evaluation.

Understanding evaluation

Activity 2

Purpose:
- To deepen our understanding of the term 'evaluation'

What to do:
Working in small groups, discuss the following questions.
1) What is meant by the term 'evaluation'?
2) How does 'evaluation' differ from monitoring?
3) What is the purpose of evaluation?
4) Who should carry out evaluation activities and why?

Make sure that your discussion about evaluation covers the following points:

Evaluation involves taking a step back from a process or project to assess whether we have been successful, where our weaknesses are, and what needs to be changed or strengthened.

"The only way forward is to take one step back."[2]

Like monitoring, evaluation needs to be a constant process built into all levels of a programme. And like monitoring, evaluation entails assessment. However, unlike monitoring, evaluation is usually conducted at a key point or an end point of a particular intervention. We take a step back and assess whether that intervention conforms to the aims or objectives set out. We can then continue with that intervention, trying to improve our efforts (formative evaluation), or we can evaluate to see what has happened (summative evaluation).

Participatory evaluation is participant-centred and is actively carried out by all the participants in the project, rather than by an outside expert. The people themselves examine their strengths and weaknesses so that they can improve their practice and lead to a more positive experience. Evaluation is an important part of the development education process. It helps us to continue the process of action-reflection (praxis) which we discussed in Module 3.

Steps in introducing Participatory Impact Monitoring (PIM)

There are a number of different steps to take when introducing and carrying out participatory impact monitoring (or PIM). We will look at each of these steps and discuss what is entailed.

Activity 3

Understanding the different steps involved in PIM

Purpose:

- To deepen our understanding of PIM

What you need:

✓ A copy of the diagram 'Steps in introducing and carrying out PIM' on page 71.
✓ A copy of the case study and questions on page 72
✓ Flipchart
✓ Koki pens

What to do:

- Read through the handout 'Steps in introducing and carrying out PIM'.

Working in small groups, discuss the following questions.

1) What are the four steps to take when introducing PIM?
2) What are the three steps to take when carrying out PIM?
3) Now read the case study on page 72 and think how these steps would apply as you answer the questions posed.

[2] From: Hope, A. and Timmel, S. (1995), *Training for Transformation*, Book II. Gweru, Zimbabwe: Mambo Press

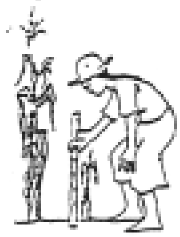
Steps in introducing and carrying out Participatory Impact Monitoring (PIM)[3] – Step by step

Steps in introducing PIM

1. What should be watched?

Expectations and fears of the group members

2. How can it be watched?



Concrete examples (indicators)

3. Who should watch?

Elected group members or an already existing committee of the group

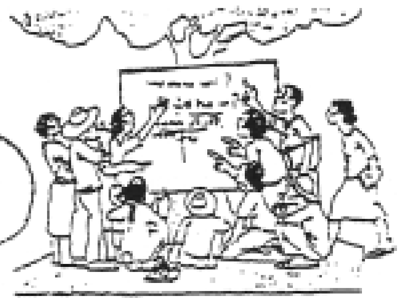
4. How can results be documented?

Graphs, charts, descriptions, that the group can understand, as well as other forms compatible with verbal transmission culture

Steps in carrying out PIM

5. What was observed?

Reports at the beginning of group meetings



6. Why these results?

Assessment and analysis by the group

7. What action should be taken?

Immediate decision making at the meeting (= plan adjustment)

[3] The following source provided the inspiration and information for Activity 3: Dorsi Germann, and Eberhard Gohl (1993), *Participatory Impact Monitoring*. GTZ – GATE 2/93. Eschborn, Germany.

CASE STUDY

There is a problem with poor nutrition in your village. Your *Reflect* circle, made up mostly of housewives and farmers, is starting a cooperative to sell nutritious foods at fair prices to the people in the community. You want to set up a PIM system to monitor the progress of the project. As you consider each of the steps pictured in the diagram, answer the following questions:

Step One – What should be watched?
- What questions would you ask group members to elicit their expectations and fears?
- Make a list of their expectations and fears/concerns/doubts.
- Prioritise 3 of these that are the most relevant. (These will form the object of observation in your group-based monitoring.)

Step Two – How can it be watched?
- Now that you have chosen some expectations and fears – make a list of indicators for each of the expectations/fears you prioritised during Step One above.

Remember that indicators are like markers – they show you whether you are still on course and what progress you have made. Indicators are concrete examples of how you can see if things change the way you want or not. For example, if you expect that basic foods will be available at fair prices, an indicator would be that prices have been linked to market prices.

Here are 4 ways to create indicators:

1) Measuring or counting: gives us exact numbers
   E.g. the quantity is counted : 20 loaves of brown bread
2) Scaling or rating: gives us a gradual description
   E.g. the quality of goods can be scaled: very good — good —average — bad — very bad
3) Classifying: informs about non-gradual categories
   E.g. Is salt available: yes/no ?
   Who takes the final decisions in the shop: men/women ?
4) Describing qualitatively: describes in words only
   E.g. How is the shop administered? The shop has a strong leadership and makes regular purchase and sale of goods.

Step Three – Who should watch?
- Who should be chosen to watch the indicators and how should these people be chosen?
- What roles and responsibilities should these people be allocated?

Step Four: How can (and why should) results be documented?
- Why is it important to document the results of the project?
- Make a list of the different ways in which the results can be documented.
- Who should decide on these different ways to document results?
- What should be done with the information once it has been documented?

Now that your circle's monitoring system has been set up – think about how regular group-based monitoring can work.

Step Five – What was observed?
Members of the monitoring team have started to keep a watch and document the indicators.
- What should they report at the beginning of each meeting and why?
- What would be the best way of reporting the required information?

Step Six: Why these results?
- After hearing the reports, what should the other members of the group be doing?

- What should the group do if they discover that there are problems?
- How important is it for the group to take action? Motivate for your answer.

Step Seven: What action should be taken?
- What kind of tool or matrix could you use to help the group plan its action?
- Where should the decisions of the group be documented?
- Why might it be necessary to change the monitoring system?

And finally:
- At what point would your group want to do an evaluation?
- How do you think this evaluation should be conducted?

Thinking about our own contexts

We will now think about how PIM applies to our own contexts in which we are using *Reflect*.

Bringing PIM closer to home

Activity 4

Purpose:
- To reflect on how we should introduce PIM in our own contexts

What you need:
- ✓ A copy of the diagram 'Steps in introducing and carrying out PIM' on page 71
- ✓ A copy of the 'Bringing PIM closer to home' worksheet (page 74)
- ✓ Pens and paper
- ✓ Flipchart
- ✓ Koki pens

What to do:
- Think of an issue which emerged from your baseline study and which is highly relevant to the context in which you are using *Reflect*. Write this issue down.
- Using the diagram of the seven steps of PIM, think about how each step relates to your own context. Ask yourself the same questions we answered when we did the case study (see worksheet on page 72).
- Write your answers onto paper, and if you wish to present them to the group for feedback also write your answers onto flipchart.
- Present your thinking to the group.

Exercise to consolidate learning

- How can you integrate what you have learned today into your work as a trainer?
- Are there any parts of today's programme that you might want to integrate into a learning programme for your facilitators?
- If so, what *learning objectives* and what *learning activities* will you include?

WORKSHEET
Bringing PIM closer to home

Checklist of questions to ask in your own contexts

Step One – What should be watched?
- What questions would you ask your circle members to elicit their expectations and fears?
- Make a list of these expectations and fears/doubts/concerns. (These will form the object of observation in your group-based monitoring.)
- Which of these are most relevant. Prioritise three.

Step Two – How can it be watched?
- Make a list of the indicators for each of the expectations/fears you prioritised during Step One above.

Step Three – Who should watch?
- Who do you think should be chosen to watch the indicators and how should these people be chosen?

Step Four – How can results be documented?
- Make a list of the different ways in which the results can be documented.
- What should be done with the information once it has been documented?

Step Five – What was observed?

Members of the monitoring team have been keeping a watch on the indicators and documenting their findings.
- What should they report and when should this be reported?
- What would be the best way of reporting this information?

Step Six – Why these results?
- After hearing the reports, what should the other members of the group be doing?
- What should the circle members do if they discover there are problems?

Step Seven – What action should be taken?
- What kind of tool or matrix could you use to help the group plan its action?
- Where should the decisions of the group be documented?
- In what circumstances might it be necessary to change the monitoring system?

Evaluation of the day

This method of evaluation is a quick method to "take the temperature" of the group and get in touch with any dissatisfactions or problems.

1. Ask each person in the group to write onto card one or two words expressing how they feel about the day.
2. Go around the circle, asking people to share these words with the group, placing their cards in front of them as they do. Do not start discussion until everyone has given their words.
3. The facilitator asks some participants, especially those who have expressed dissatisfaction or whose comments are puzzling, to explain why they have said what they did.

Designing and Developing
a Learning Curricullum

MODULE 9

In **MODULE NINE** we will review the key development issues identified during our community baseline studies and explore how we can develop these issues into a needs-based curriculum for a structured learning process. We will look at what information we need to develop a facilitator's manual with learning units for a *Reflect* programme. We will also have the opportunity to practise writing our own materials as we think about how to implement actions to address the development issues we have discussed.

- What is meant when we say that *Reflect* is a *structured* learning process?
- How do we structure a learning process?
- What are the different parts of a facilitators' manual?
- What is a learning unit, what are the different parts of a learning unit and how is it written?
- How do we plan for and structure a session or meeting with participants?

Learning objectives

In this module we will learn about:

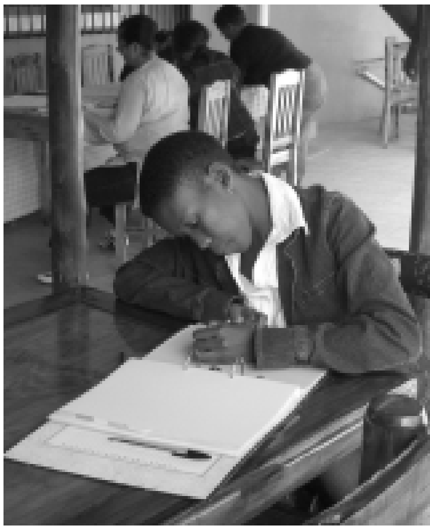
- How to use the key issues identified from baseline studies to inform a learning curriculum or programme
- How to structure and write learning units that make up a facilitators' manual
- How to structure and write session plans that make up learning units
- Critical reflection skills as we evaluate the day

Thinking about *Reflect* as a structured learning process

Reflect is defined as "a structured participatory learning process" where participants construct and interpret locally generated texts. What does this mean? What kinds of texts are generated as part of the *Reflect* process?

Activity 1

Talking wheel[1] : thinking about the facilitators' manual



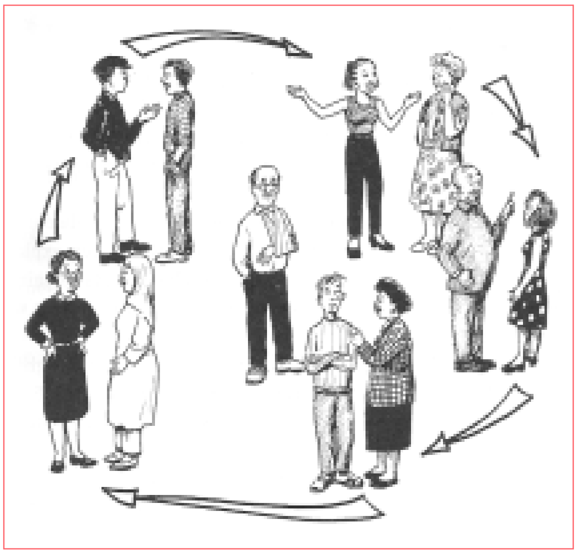
Purpose

- To deepen our understanding of a local facilitators' manual and its place in the *Reflect* programme
- To provide an opportunity for participants to hear and share different views and experiences

What you need:

✓ A list of questions and/or statements that have been prepared beforehand to use in this activity.

[1] Activity and illustration drawn from *Shifting Paradigms*. An Early Learning Resource Unit pubication, 1997



What to do:

- Ask participants to find a partner and stand opposite him/her so that the group forms an inner and outer circle.
- Instruct the participants to share with their partners their thoughts about the questions/statements that you call out.
- Ask the first question/statement on your list. Allow about 2 minutes for the participants to discuss this.
- Now tell the outer circle to move one person to the left. Provide another question/statement for the participants to discuss with their new partners.

Questions and statements about *Reflect* as a structured learning process

- Imagine that you are introducing *Reflect* to someone who has never heard of it before. You tell them that *Reflect* is a structured learning process – explain what you mean by the word 'structured'. What is structured and how?
- What is a facilitator's manual and what kind of information is included in this manual?
- Who is responsible for writing the facilitators' manual?
- Share with your partner your experiences of writing units for a facilitators' manual.
- Share with your partner your experiences of using a facilitators' manual. What successes and what problems have you had?
- How do (or don't) locally generated texts fit into the facilitators' manual?

Designing a facilitators' manual

The facilitators' manual is a document that provides valuable guidance to facilitators working in the field. There are a number of different parts that make up a facilitators' manual.

Activity 2 **Putting the parts together**

Purpose:

- To consolidate our understanding of the different parts of a facilitators' manual
- To share our views and experiences with one another

What you need:

✓ A list of elements or parts of a facilitators' manual
✓ Coloured card
✓ Glue
✓ Flipchart paper

What to do:

- Working in pairs, participants work together to think about how the provided list of parts relate to one another.
- Each part should be written onto a card or onto flipchart paper and arranged into a picture that best represents their understanding of a facilitators' manual and its different parts. Parts can be placed inside each other, next to each other, on top of each other – in any way in which the group sees fit.
- The final arrangement of cards that makes up the graphic should provide a picture of how a facilitators' manual works. In other words, the parts should be ordered together in a way that shows *relationship* of parts to one another as well as *sequence*.
- Participants have an opportunity to walk around and view, hear about and discuss one another's pictures.

List of parts of a facilitator's manual

- Tool
- Numeracy
- Session
- Education
- Facilitators' manual
- Planning
- Issue/problem
- Discussion
- Evaluation
- Supplementary materials
- Unit
- Reflection
- Analysis
- Literacy
- Communication

Learning units

Now that we have a better understanding of how a facilitators' manual is structured, we will spend some time looking at how we write learning units.

Learning units are like *themed chapters* within the facilitators' manual. Each unit has a particular topic and it is this topic that forms the focus for that unit and the meetings or sessions within that unit. One unit might take six to eight meetings (or sometimes even more) to complete. How long it takes depends on how relevant the issue is and how interested the participants are in the topic.

Aims

The unit has a particular structure which shapes the way we deal with the topic. When we write a learning unit, we need to consider what the **aims** of the unit are, and then make sure that the aims for each meeting (or session) in the unit correspond with the general aims of the whole unit. For example, if the aim of a unit is to address health and hygiene in a community, we should make sure that all the meeting plans within that unit are related to this central aim. Here is an example (adapted from the *Mother Manual*) of how this might be done.

Mother Manual – written by David Archer and Sarah Cottingham of Action Aid, the *Mother Manual* was the first resource for *Reflect* practioners to be published.

EXAMPLE – Aims of a Unit

Name of unit:	HEALTH AND HYGIENE
Aim of:	
Unit	To discuss health problems and strengths in the local environment.
Meeting 1	To construct a map that shows elements in the environment which cause bad health, and elements in the environment which promote good health.
Meeting 2	To discuss and analyse issues that were brought to the fore during the mapping exercise.
Meeting 3	To think about how the group can work together to take action that will improve the hygiene of the village.
Meeting 4	To generate vocabulary around health and practise collective writing.
Meeting 5	To explore large numbers, addition and multiplication as participants calculate the cost of building different types of latrines.

continued/...

Aims of a unit continued

Meeting 6:	To read information about the costings of the construction of latrines wells. To read DIY guides to building latrines/wells.
Meeting 7:	To learn more about building a latrine or well from a builder who has experience of this.
Meeting 8:	To reflect on what we have learned and evaluate the progress we have made with regard to improving our knowledge about health problems and strengths in the community.

Activities

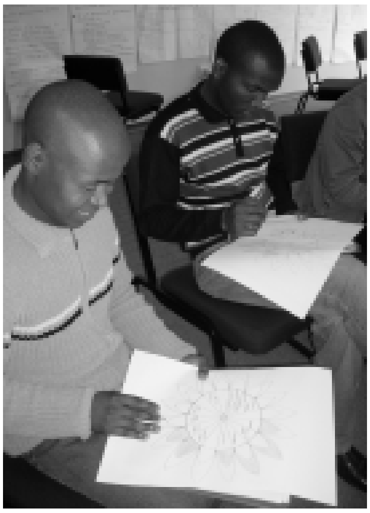
The activities planned for each meeting should help participants to realise the aims for that meeting. Activities can include:

- Constructing graphics (Usually meeting 1)
- Discussion and interactive group work
- Listening
- Reading
- Writing
- Numeracy and mathematical activities (which activities will be determined by the level of the group members)
- Collecting information
- Planning and making arrangements
- Field visits to places of interest
- … and more!

A combination of these activities can be included in any one meeting. It is good to vary activities so that participants practise different ways of learning and do not get bored. (Remember what we said in Module 3 about how adults learn?)

Structuring meeting/session plans

When facilitators plan their meetings, they need to think not only about the aims of the meeting and **activities** that participants will be engaged in. They also need to think about what **preparation** is needed for the meeting and the **time** that the different activities in the session will take. It will also help facilitators if they think ahead about some of the **questions** they will ask participants as they engage in the different activities. The structure of a typical session plan might look like this:



Topic:

Aim:

Preparation:

Activities:

Questions:

Time:

We will take one meeting from the ‘Health and Hygiene’ example given on page 77 to illustrate what a meeting/session plan might look like:

EXAMPLE – Meeting/session plan

Topic:	Health and hygiene – MEETING 1
Aim:	To construct a map that shows elements in the environment which cause bad health, and elements in the environment which promote good health.
Preparation:	Materials needed to construct the graphic Koki pens, cards, flipchart paper Exercise books and pencils
Activities:	Construct the graphic (Give details of how this should be done) Transfer the graphic to flipchart
Questions:	• What do you think are the causes of good and bad health? • What do you think are the causes of bad health here in the village? • Are there areas in the village where there is a lot of rubbish/areas where there is stagnant water, etc? • Are these areas risk areas, and if so, why? • Are there areas of the village where we can find positive health and hygiene things (such as medicinal plants or clean water)? • Why are these things positive rather than negative?
Time:	2 hours

Writing units and session plans

Activity 3

Purpose:

- To practise writing units and sessions plans

What you need:

✓ Note paper and pencils

What to do:

- Ask participants to select 3 – 5 key issues which emerged from their baseline studies.
- Working in groups (formed according to similarity of issues), write a unit that addresses each of the themes you have selected.
- Remember that your unit should be structured as per the example given on page 77.

It may help you to write out the aims for the unit as a whole and for each of the meetings first, before you provide the other details.

- Prepare your units to be presented to the plenary.

Exercise to consolidate learning

- How can you integrate what you have learned today into your work as a trainer?
- Are there any parts of today’s programme that you might want to integrate into a learning programme for your facilitators?
- If so, what *learning objectives* and what *learning activities* will you include?

Evaluation of the day

- Prepare and write onto cards a number of questions (see below).
- Using prestick or masking tape, tape these questions under participants' chairs before they arrive in the room.
- Ask participants to reach under their chairs to see whether there is a question placed there. If there is, ask them to read the question to the group and then answer the question.

Suggested questions:

- What part of the day did you most enjoy? Explain why.
- What part of today did you find most useful? Explain why.
- What part of the day did you find most difficult? Explain why.
- What did you learn today that will make a difference to your work?
- Is there any part of today that you are still unclear about? Explain your difficulty and ask if anyone else from the group can help explain the problem.
- Do you understand the structure of the facilitators' manual? If so, explain this to the group. If not, ask another group member to volunteer to explain it.
- Do you understand the structure of a unit? If so, explain this to the group. If not, ask another group member to volunteer to explain it.
- What part of the day did you not enjoy? Explain why.

Implementing *Reflect*

MODULE 10

In this final module, **MODULE 10** of the course, we will focus on issues related to the implementation of *Reflect*. We will discuss the key issues and steps that need to be considered when developing and implementing a *Reflect* programme. We will then focus on those areas which are pertinent to the role of trainers but which have not yet been addressed in this course – namely what facilitators' and trainers' responsibilities are, what managing a *Reflect* circle entails, and how best to support facilitators. By the end of this module, you should have a good overview of implementation and management issues.

- What are the key issues and steps that need to be considered when developing a *Reflect* programme?
- Which of these issues and steps are we, as trainers, responsible for?
- What are facilitators' various responsibilities?
- How are *Reflect* circles best managed?
- How can we best support and motivate facilitators?

Learning objectives:

In this module we will learn about:

- The key issues and steps that should be considered when developing a *Reflect* programme
- The responsibilities of trainers and the responsibilities of facilitators
- Best management practices for a *Reflect* circle
- How to support and motivate facilitators
- Critical reflection skills as we review our self-assessment sheets and evaluate the training in general

Implementation of *Reflect*

As trainers, you need to have a good overview of the key issues and steps that should happen in an organisation planning to develop and implement a *Reflect* programme.

Other responsibilities which you have as a trainer are outlined in a separate handout attached at the end of this module – see handout entitled 'Outline of *Reflect* trainer responsibilities and suggested criteria'.

Activity 1

Putting the pieces together: thinking about implementation[1]

Purpose:

- To deepen our understanding of the different steps that need to be taken when implementing *Reflect*
- To provide an opportunity for participants to hear and share different views and experiences

[1] Activity and implementation steps checklist created by Louise Knight

What you need:

✓ 22 pieces of the 'Implementation puzzle' on page 83

This puzzle can be made up using the template on the opposite page. Make colour or black and white photocopies of the page and then cut up the boxes, putting all 11 of the grey boxes in one envelope and all 11 of the white boxes in another envelope. Each group should get an envelope of grey pieces and an envelope of white pieces.

What to do:

- You will receive an envelope in which there are 11 grey pieces and 11 white puzzle pieces. Each grey piece has a white partner. In pairs or groups, read through the pieces and match each grey piece with the description (in white) that you think fits it best.
- Now arrange the grey pieces and their corresponding white partners in chronological order (i.e. sequence them in the order in which they should happen). Number the pairs of pieces from 1 – 11 as you have arranged them.
- Present your completed puzzle to the plenary, discussing any differences that emerged between the different groups.

  (You will find the complete puzzle sheet in the order it should be completed on the next page.)

Activity 2 **Discussion and reflection**

- Ask for volunteers to share and discuss their experience of the different steps in the implementation process.
- Which of these steps do you feel that you as a trainer are directly responsible for and why?
- Which of these steps have and haven't we covered in the training so far?
- Which of these steps are you comfortable with?
- Which of these steps do you feel you still need to learn more about?

  (Add this information to your self-assessment sheet which we completed in Module 2.)

Managing *Reflect* circles and supporting facilitators

It is really important that *Reflect* circles are well managed. As trainers, we should make sure that we understand what facilitators' responsibilities are and how we can assist them to carry out these responsibilities.

Activity 3 **Brainstorming facilitators' responsibilities**

Purpose:

- To ensure that we as trainers understand the different responsibilities of a facilitator

What you need:

✓ Koki pens

✓ Flipchart

Reflect IMPLEMENTATION STEPS CHECKLIST

This sheet outlines the key issues and steps you will need to consider in developing a *Reflect* programme

Implementation flowchart	Explanatory notes
✓ Orientation of management	A 1-3 day workshop, where management explore what *Reflect* is all about, consider possible ways of using *Reflect* in the context of the work they do, think through aspects of programme scale, in which communities to implement *Reflect*, length of the programme, capacity issues and costs etc.
✓ Compile a working document	A document that considers partnerships, a contextual analysis, different stakeholders, capacity needs (e.g. where and how to secure sources of expertise, funding and additional resources), staff for training as trainers.
✓ Training of Trainers	Minimum of 10 days training. Such staff will be key role players in the implementation of *Reflect*. They train facilitators, provide ongoing support, and take major responsibility for ensuring implementation goes as planned.
✓ Introduce ***Reflect*** in communities	Entails meeting local leaders and exploring *Reflect* with them, holding a community meeting and agreeing expectations, as well as working with the community to identify facilitators.
✓ Train facilitators	Plan and conduct initial facilitator training of minimum 10 days and develop a structure and process for follow-up training and support.
✓ Conduct a baseline study	Facilitators are involved in conducting the study in the selected communities, giving them the opportunity to practise facilitating participatory tools before facilitating the complete *Reflect* learning process. This study determines the development issues of priority for communities and forms the basis for compiling the facilitators' manual.
✓ Develop a facilitator's manual	Based on issues identified in the baseline study, the locally contextualised manual forms the programme 'curriculum' and guides facilitators through the *Reflect* learning process.
✓ Design and develop a participatory monitoring & evaluation (PM&E) system	Consideration and agreement about what should be observed, how and who should do it. Also about how results should be documented (the types and formats of documentation) and for what purpose. Decisions also need to be agreed on how to store and use the information.
✓ Managing ***Reflect*** circles	*Reflect* circle participants can be recruited while the baseline study is being conducted, or once the project is ready for implementation. Facilitators should be aware of and able to carry out their various managerial and other responsibilities. The PM&E system should be put in place from the onset.
✓ Support & motivation of trainers and facilitators	The organisational structure & budget should make provision for selected staff to support trainers & facilitators on a regular basis, for regular facilitator meetings & workshops and an annual refresher training for staff & facilitators.
✓ Sustaining a literate and action-orientated environment and keeping ***Reflect*** alive	*Reflect* is an intensive, extensive and potentially open-ended process. Direct support and management by the implementing organisation will be most intense at the start of the process, for the first year to 18 months. However, if this is managed well, as capacity of local facilitators and organisations is built, the capacity support needs should decrease and the local *Reflect* circles, with the support of their facilitators, should be able to continue driving the process from within.

What to do:

- Facilitators have a number of responsibilities. In groups, brainstorm what these responsibilities are.
- What are the different materials and documents which facilitators need and should use as they carry out these responsibilities?
- Pay special attention to the responsibilities entailed in managing a *Reflect* circle.
- What are these different responsibilities?
- What are facilitators' monitoring and evaluation responsibilities?
- What materials are needed by facilitators to ensure that these responsibilities are carried out?

Activity 4 **Supporting facilitators**

Purpose:

- To discuss and understand better how we as trainers can support the facilitators with whom we work

What you need:

✓ A copy of the case study and questions (below)

What to do:

- Read the case study below.
- In groups, think about the different ways in which you as a trainer can support the facilitator described.

CASE STUDY

Mashudu is a facilitator who was recently trained by you in a TOF workshop. She is working for a women's organisation in rural Limpopo and has established a circle which focuses on women's issues and supporting women. However, since the training, she has been having some problems:

- First, she is still unsure about how to write units and session plans that will guide her work.
- Second, she is not keeping any records of the work she is doing.
- Third, although her circle is only 4 months old, she is losing participants. She started with 22 women, but only 8 are attending regularly. She is not sure why there is such a high dropout rate.

Discussion Questions

1) In what ways can you as a trainer support Mashudu to be a better facilitator?
2) Explain how you would go about offering this support.
3) You want to put a monitoring process in place to help Mashudu.
   - What indicators will you be looking for when you visit Mashudu in her circle?
   - What indicators will you be looking for when Mashudu attends the monthly facilitators' meetings?
   - What kind of reporting formats do you think would help Mashudu with her monitoring?

Make sure your discussion covers the following points:

Facilitators' responsibilities:

Refer also to the notes entitled 'Outline of *Reflect* facilitator responsibilities and suggested criteria' which appears at the end of this module.

- ✓ Introduce *Reflect* to the community
- ✓ Establish a circle
  - Recruit participants
  - Find a place for the circle to meet
  - Explain the *Reflect* approach
  - Collect baseline data
  - Map out the problems in the community
- ✓ Help set up a *Reflect* committee (refer to information sheet at the end of this module)
- ✓ Manage the circle
  - Prepare sessions before the meeting (session plans)
  - Register participants
  - Facilitate the meeting
  - Record the discussion and outcomes of the graphic/tool constructed
  - Record progress of the participants and circle using appropriate monitoring tools (such as participant profile forms and circle progress records)
  - Follow up participants who are absent
- ✓ Attend monthly workshops
- ✓ Report back at monthly meetings
- ✓ Submit monthly reports to trainer/coordinator
- ✓ Attend refresher training and collaborate to ensure that quarterly appraisals are conducted
- ✓ Help write units for the facilitators' manual
- ✓ Help sustain a literate environment (Find ways for people to use their literacy, numeracy and communication skills)

Materials and documents needed by facilitators and participants

- Facilitator's manual
- Record book for facilitator (to record the register, session plans, record of graphics and discussion)
- File to record participants' information and progress
- Exercise books for participants
- Blackboard and chalk
- Flipchart
- PRA cards
- Local materials
- Visitors' book

Supporting facilitators

As trainers, we need to support facilitators with the following:

- The development of units
- Session planning
- Record keeping

- Networking with wider communities, government departments and NGOs
- Exchange visits to other *Reflect* projects

As trainers we should be supporting facilitators through regular workshops, monthly meetings as well as through offering refresher training. As trainers we should also visit the facilitators we have trained to find out how they are doing and what problems they are facing. During our workshops and visits we should be monitoring and documenting progress of circles and facilitators, as well as areas to be strengthened. Our advice should be constructive and supportive and we should always give feedback to facilitators. (We want facilitators to feel that we are supporting them rather than just checking up on them.)

Activity 5

Self-evaluation

Purpose:
- To review the knowledge and skills you have gained during the course of this training
- To continue to think about the knowledge, skills and attitudes that you still need to master in order to keep on improving your skills as a trainer.

What you need:

✓ Pen or pencil

✓ Copy of the 'Self-evaluation worksheet' which you completed in Module 2

What to do:
- Sit quietly and review the areas of knowledge and skills that you identified on your 'self-evaluation worksheet' in Module 2.
- Are there any areas of knowledge or any skills or attitudes that you feel have improved?
- Are there any that still need improvement? Or perhaps there are new areas or goals that you would like to add?
- Write down any comments you have. Try to describe to yourself exactly what you still want to improve and why.

Exercise to consolidate learning

- How can you integrate what you have learned today into your work as a trainer?
- Are there any parts of today's programme that you might want to integrate into a learning programme for your facilitators?
- If so, what learning objectives and what learning activities will you include?

Reflect Committee

Information Sheet[2]

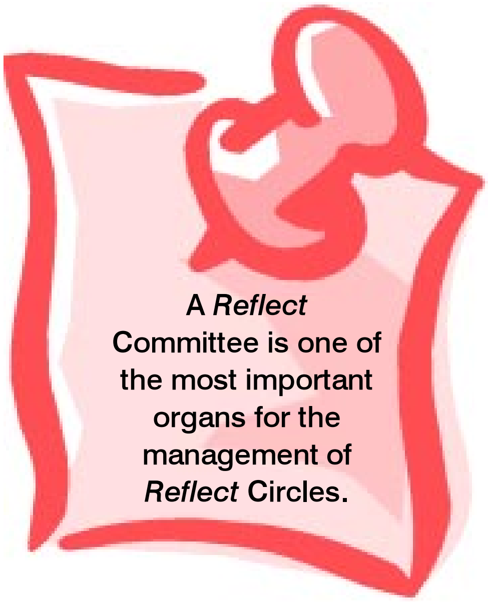
What is the role of the *Reflect* Committee?

The role of the committee is to see to the formation, management and welfare of *Reflect* circles.

What are the responsibilities of the *Reflect* Committee?

The key responsibilities are:

- Liaison between the circles and wider community.
- Monitor the activities of the circles.
- Assist in the implementation of circle action plans.
- Provide a link between circles and other agencies.
- Help resolve issues affecting the circles.
- See to the careful use of circle materials.
- Ensure motivation of the facilitators.



Who should be a member of a *Reflect* Committee?

Membership of the committee should *preferably* include 1–2 facilitators, 1–2 participants from each circle, a youth leader, a women's leader and 2–3 other community members with positions of 'status' or influence, for example the community leader/chief, a pastor or the ward councillor etc.

How often should a *Reflect* Committee meet?

It is up to the members of the *Reflect* Committee to establish their own 'rules'. However, the Committee should preferably meet not less than once a month. The important factor is that, like *Reflect* Circles, the *Reflect* Committee should themselves discuss and agree when, where and for how long to meet.

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[2] Compiled by Louise Knight

Outline of *Reflect* TRAINER responsibilities and suggested selection criteria[3]

ROLE AND KEY RESPONSIBILITIES

Trainers are key role-players in the implementation of *Reflect* . They train *Reflect* facilitators at community level and provide regular, ongoing guidance and support. In short, trainers drive the effective implementation of the process on a day to day basis.

Key responsibilities are:

- ✓ To attend and fully participate in a *Reflect* training of trainers (TOT) residential course of minimum 10 days, possibly conducted in two blocks, each of five days.
- ✓ Attend and fully participate in any other *Reflect* or participatory practices training sessions/ courses as may be offered by the implementing organisation and/or partner organisation(s) from time to time.
- ✓ Design and prepare a *Reflect* facilitator training programme, usually of minimum 10 days using participatory tools, techniques, processes and principles, etc which were shared and learned in the *Reflect* TOT.
- ✓ Provide consistent advice and ideas to community *Reflect* facilitators when solicited or seen as necessary.
- ✓ Regularly attend *Reflect* circle sessions, particularly in the early sessions, in order to closely support and coach *Reflect* facilitators. The level of supervision will reduce over time, although regular circle support visits (monthly) should be maintained, as well as regular facilitator meetings/workshops (monthly) at least in the first year of implementation of the *Reflect* process.
- ✓ Support and provide guidance to facilitators in researching and accessing information and/or expertise that may be solicited or seen as necessary by the facilitators/circle participants.
- ✓ Plan, design and prepare regular (monthly) *Reflect* facilitator training workshops that respond to issues, challenges and needs identified with facilitators.
- ✓ Document proceedings, outputs and findings, etc of trainings, circle visits and any other relevant monitoring and/or development activities. Documentation should be done through text and/or graphics and maintained along with any other monitoring records established with/by the implementing organisation.
- ✓ Attend and participate openly in quarterly reviews to be carried out by the implementing organisations' project manager/other relevant staff member responsible for the *Reflect* programme.

Suggested *Reflect* trainer selection criteria:

It is important that the organisation using the *Reflect* approach has trainers who are familiar with some variation of participatory approaches and/or practices that can provide a foundation on which to build. *Reflect* trainers can be anyone who wants to design a *Reflect* programme and manage its implementation. They should be leaders of organisations or experienced *Reflect* facilitators who have been promoted within their organisation. They may be new to adult education or experienced practitioners. Whichever the case, they will be respected members of the community. It is recommended that the implementing organisation does not select

[3] Compiled by Louise Knight

someone who is already very busy with many other projects and will not have time to devote to the project, since this is a key role for effective implementation of the *Reflect* programme which demands time and energy.

With this in mind, it is important to be aware of some basic criteria for selecting trainers, though the implementing organisation will doubtless add their own local criteria:

- ✓ Trainers should not see themselves as ‘teachers’ or ‘supervisors’, but rather as ‘mentors’ and ‘guardians of quality *Reflect* implementation’.
- ✓ Willingness and availability to attend a minimum of 10 days intensive residential TOT training.
- ✓ Capability to transfer skills from their own training with minimum supervision in order to design a *Reflect* training programme (i.e. capacity to use their own initiative and have confidence to train).
- ✓ Willingness and availability to train facilitators in the local context.
- ✓ Genuine interest and commitment to designing a *Reflect* course/programme and managing its implementation.
- ✓ Capability to support and mentor facilitators using participatory practices. The style and nature of this support should be empowering and not undermining to the confidence and independence of the new facilitators.
- ✓ Capable and willing to research information that may be required by the facilitators/circle participants from time to time.
- ✓ Possess a demonstrated interest in community-driven development, empowerment and adult education.
- ✓ Able to mobilise, lead and facilitate a transformative process.
- ✓ Capacity to talk about sensitive issues in an open and non-judgmental way with those who are older than themselves as well as younger.
- ✓ Ability to read and write English (including for report writing) as well as local language where *Reflect* will be implemented fluently.
- ✓ Well organised approach to work and ability to work without supervision.
- ✓ Must be able to meet deadlines (for report writing particularly).
- ✓ Able to commit between 12–15 hours per week to managing and supporting the implementation of the *Reflect* programme, with some intensive working weeks, particularly in the first months of implementation of *Reflect*.
- ✓ It is preferable if the trainer lives near the *Reflect* community or implementation site, or is at least fully versed with and able to relate to the context.

Outline of *Reflect* FACILITATOR responsibilities and suggested selection criteria[4]

ROLE AND KEY RESPONSIBILITIES

Facilitators are central to the *Reflect* approach. They create an environment for circle members at community level to learn and share, open up, understand, deliberate on their issues, build consensus and make informed action-orientated decisions. In short, facilitators guide a process of reflecting, thinking and deeply analysing, learning, sharing, planning and acting. Facilitators must be adequately trained and mentored.

Key responsibilities are:

- ✓ To attend and fully participate in a *Reflect* Facilitators, (probably residential) course of minimum 10 days, possibly conducted in two blocks, each of five days.
- ✓ Attend and fully participate in any other *Reflect* or participatory practices training sessions/refresher courses that may be offered by the implementing organisation and/or partner organisation(s) from time to time.
- ✓ Organise/mobilise 15–30 participants to regularly attend circle meetings/sessions.
- ✓ Reflect on key circle discussion points in order to plan and prepare appropriate learning units and session plans.
- ✓ Familiarise themselves with *Reflect* participatory tools and techniques.
- ✓ Source information and materials to support discussion and analysis, planning and action.
- ✓ Facilitate the circles for 2 hours at a time, at least twice a week.
- ✓ Attend monthly meetings and/or workshops.
- ✓ Attend and openly participate in regular (possibly weekly) facilitator learning and sharing meetings.
- ✓ Keep and maintain records of session plans; attendance; absences; participant profiles; the topics; learning and sharing covered in the sessions; graphics produced by participants. Documentation should be done through text and/or graphics and maintained along with any other monitoring records established with/by the implementing organisation.
- ✓ Attend and participate openly in support visits (monthly) and reviews (quarterly) to be carried out by the support trainer(s).

Suggested *Reflect* facilitator selection criteria:

Listing what makes a good facilitator is not an easy task and there may be no universal truths. Whilst criteria should be flexible, it is important to be aware of some preferable criteria as suggested below:

- ✓ Facilitators should not see themselves as ‘teachers’, but rather a ‘coach’ who creates an enabling and conducive environment for equal participation, action-orientated sharing and learning.
- ✓ Local to the community (same/nearby village or neighbourhood), coming from the same socio-economic/cultural group as the proposed participants in order to promote an internal and sustainable community process as well as understanding and harmony. NOTE: Where the *Reflect* process is being implemented to focus on sensitive issues such as sex, sexuality,

[3] Compiled by Louise Knight

HIV and AIDS, abuse etc, it is preferable if the facilitator comes from a nearby area rather than from the same village/neighbourhood.

- ✓ Of sufficient age to be respected and able to address any emerging sensitive issues with those who are older as well as younger than themselves.
- ✓ Facilitators should respect participants and not regard themselves as superior on grounds of education, class, gender, culture etc.
- ✓ The facilitator should be chosen after a process of community discussion, but the final decision should lie with the proposed participants.
- ✓ Willing and available to attend and participate openly in a (residential) *Reflect* facilitators training course of a minimum of 10 days possibly conducted in two blocks, each of five days.
- ✓ Genuine interest and commitment to community-driven development, empowerment and adult education as well as to his/her work.
- ✓ Is respected and able to mobilise, guide and facilitate a transformative process.
- ✓ Basically literate and numerate. (In respect of formal educational level there may be no absolute rules. As a guideline, facilitators may find it hard if they have not completed primary school themselves, but the real issue is not how many years they were at school but whether they have the other qualities of a good facilitator.)
- ✓ Communication skills are essential, as well as willingness to attend meetings, workshops and other learning events/activities.
- ✓ Capable and willing to research information that may be required by the circle participants from time to time.
- ✓ Capacity to produce guided monthly reports, ideally in English, but certainly in the local language where *Reflect* will be implemented fluently.
- ✓ Well organised approach to work and capacity and confidence to use own initiative.
- ✓ Ready and willing to make a commitment of at least a year and at the very least for one 2 hour session a week, preferably two sessions each of 2 hours.
- ✓ Able to commit about 10 hours per week to facilitate and manage the *Reflect* circles as well as to support peers in the *Reflect* programme.

Reflect TRAINING OF TRAINERS (TOT)

Block Two

Evaluation Form

1. What did you think of:
   a) the content of block two?

   b) the facilitation?

   c) the activities?

2. What were the most important things you learned during block two?

3. Comment on:
   a) the presentation and usefulness of the handouts/learning materials

b) level of materials and discussion (too easy/too difficult)

c) time allowed for discussion

d) time allowed for reflection

4. What would you change about block two? Please suggest alternatives.

5. Were you catered for well in terms of food and accommodation?

6. Do you have any suggestions or comments for consideration in relation to future TOT trainings?

RESOURCES

Glossary

Code of conduct
A code of conduct is a document of guidelines about how people in a particular situation should behave. A code of conduct for trainers and facilitators sets out the responsibilities of trainers and facilitators and states how they should treat each other and the people with whom they work.

Curriculum
A curriculum is a programme of learning and/or activities. It guides learners along a particular learning path.

Empowerment
Empowerment is the process of claiming power for one's self or one's group in a way that challenges oppression and powerlessness.

Facilitator
A facilitator is a person who initiates a learning and action process at a community level, and then supports participants to keep that process going. A facilitator helps to create a favourable learning environment by encouraging learners to think, discuss, analyse and act.

Gender
Gender is a social meaning that is associated with the biological and physical differences between males and females. It includes expectations of certain roles, behaviours and qualities, for example women are 'naturally' expected to be gentle and pretty, while men are 'naturally' expected to be brave and strong. These expectations may differ in different societies, but most societies value what is 'male' above what is 'female'.

Indicator
An indicator is exactly that – an indicator. It gives you a signal or clue about something. For example, a fuel gauge on a car gives you a signal about how much fuel is in the car. When you are doing research or collecting baseline data, an indicator gives you a sign or indication about something which you want to learn more about. For example, if you are collecting information about the prevalence of orphans, your indicator might be the number of orphans in a particular area.

Oppression
Oppression is a situation which comes about when one group of people exercises power in an abusive way over another group of people. The dominated group may feel powerless, abused, or inferior. Examples of oppressed groups include women, children, 'black' people, homosexuals, old people, disabled people and poor people.

Participatory Rural Appraisal (PRA)
Participatory Rural Appraisal – or PRA – is a participatory approach that enables local people to use their knowledge to inform the planning and implementation of development projects or programmes. Using a range of PRA techniques or tools, participants themselves identify, analyse and take action around problems in their communities. (You will find more details about different PRA tools in a table which appears after this glossary.)

Power
There are many different understandings of power. Some people see power as an instrument of domination which an individual or a group uses in an authoritative and coercive way over another individual or group (for example, when a man wields power over a woman in order to get her to do what he wants her to do). However, power does not have to be repressive. It can also be exercised in a legitimate and constructive way. People can claim power for themselves as they act to change situations in their lives. In this way, they become empowered.

Political or institutionalised power is the kind of power which society gives to certain groups or individuals. There are different kinds of political power.

- Certain groups have access to economic or financial resources. We call this material power.
- Certain groups have access to shaping ideas and beliefs which become the 'norm' in society. We call this ideological power.
- Some groups have access to power in the various institutions of society including the law, education, government, etc. We call this institutional power.

These different kinds of power can also be wielded in either a repressive or constructive way.

Reflect
Reflect is a structured participatory learning process which facilitates people's critical analysis of their environment, placing empowerment at the heart of sustainable and equitable development. Through the creation of democratic spaces and the construction and interpretation of locally-generated texts, people build their own multi-dimensional analysis of local and global reality, challenging dominant development paradigms and redefining power relationships in both public and private spheres. Based on ongoing processes of reflection and action, people empower themselves to work for a more just and equitable society.

Rights-based approach (RBA)
A rights-based approach to development uses human rights as a framework or a road map to guide development agendas. Civil and political (CP) rights (the right to a trial, the right not to be tortured), as well as economic, social and cultural (ESC) rights (the right to food, housing and a job) provide the foundation for defining development agendas and policies.

Secondary data
Secondary data is data that you collect from secondary sources, not your main – or primary – source (which is usually the people with whom you are working). Secondary data might take the form of statistics or records or reports or other documents (for example from a clinic or government department).

Trainer
A trainer is a person who conducts training for *Reflect* practitioners at different levels and provides ongoing guidance and support to the people they train. A trainer is expected to manage the content as well as the process of a learning experience. A trainer is also expected to undertake managerial responsibilities as part of the process of implementing *Reflect* programmes and mentoring and supporting facilitators.

TOF
A 'Training of Facilitators' (TOF) programme provides support and mentoring for people who wish to strengthen their skills as facilitators (i.e. those people who work at community level with participants of a *Reflect* circle).

TOT
A 'Training of Trainers' (TOT) programme provides support and mentoring for people who wish to strengthen their skills as trainers (i.e. those people who support and manage facilitators in their work at the community level).

PRA TOOLS[1]

There are a range of different PRA tools which can be used by *Reflect* practitioners. The following table sets some of these out and explains how each of the tools can be used as well as the different purposes for which they might be used .

Tool	Purpose of tool	How to construct the tool	Other issues the tool could be used for
Body mapping	To look at the qualities, roles and responsibilities of people or individuals on an issue	1. Ask one of the participants to volunteer to lie down on the ground. Ask another participant to draw around the outline of that person with a stick. If using flipchart, prepare 6 pieces of flipchart and join them together. 2. Share experience of the issue you are dealing with. 3. Mark the map by using e.g. writing, symbols, pictures, etc. 4. Share in plenary the picture. 5. Based on the issue you dealing with, if you are using two maps you could make a comparison of the two.	1. Effects of drug usage 2. Effect of stigma around HIV and AIDS 3. Health 4. Unequal power amongst people, e.g. attitudes and behaviours amongst men and women 5. What parts are sexually aroused when touched
Sundial tool	To give order to shared ideas and to show level of importance of ideas	1. Using cards, write on one of the cards the issue that you are dealing with e.g. why adults learn. 2. Place this card in the middle of the floor or ground. 3. Ask the question based on the issue. 4. Write ideas/thoughts on card (1 per card). 5. Cluster similar ideas/thoughts together. 6. Give each cluster a heading. 7. Using string to shape the sun e.g. according to importance.	1. To prioritise needs 2. Types of crimes 3. Common causes of crime
Mapping	To identify issues that are important and relevant for participants to discuss in the circles. To introduce mapping as a way of learning	1. Before constructing the map, have some card in different colours and cut into different size circles. You will also need some square pieces of card and koki pens. 2. Ask participants to clear an area for constructing a map on the ground. 3. Ask the participants to start constructing a map of the community; start by drawing in the big things e.g. roads, rivers, mountains and fields. 4. When everyone agrees on the accuracy of the map, ask them to use locally available materials (stones, string, pieces of scrap cardboard, wood, bottle tops, etc.) to symbolise different things like houses, schools, churches, shops, etc. Encourage participants to illustrate the	1. To identify issues or needs in the community 2. Natural resources map 3. Crime – types and where it happens 4. Locations of the various stakeholders in the community 5. To show changes over the years or generations, and to anticipate changes or expectations for the future 6. Can be used to gather baseline data

[1] Compiled by Louise Knight and Yoemna Saint

Tool	Purpose of tool	How to construct the tool	Other issues the tool could be used for
Mapping cont.		positive developments as well as the problems. Also encourage them to illustrate where the key resource people and services for the community are located. 5. Ask participants to identify different buildings and ask them to explain their illustrations by making a key next to the map e.g. if you use stones to symbolise houses, ask them to draw a picture of a house on a card and place this next to the stone, etc. until you have made a complete key for the map. 6. To personalise the process, ask everyone to locate where they live on the map. 7. When everyone agrees that the map is complete and accurate, ask participants to use the different coloured circles of card to illustrate whether the different resources on the map have a positive or negative value (use one colour card for positive and the other colour for negative). If participants note that some resources have both a positive and negative value, they can use the circle of each colour to represent this. Encourage participants to use different sizes of circles to illustrate how they see the relative value of the resource, so the more valuable, the bigger the circle. If it has a small negative value, they should place a small circle of the negative colour next to the resource, etc. 8. Now that everyone has agreed that the map is accurate, ask some of them to draw it onto flipchart paper so that the group has a permanent record of the discussion they had when creating the map.	
Ranking matrix	To compare things and find out which is the most important	1. Ask participants to select five or six problems from the problem cards they previously clustered. Ask each person to write the same problems on new cards. 2. Remember, if participants select a problem like, ‘poverty’ ask them if this problem is something a community can deal with by themselves. This kind of problem in itself is too big to tackle at community level. This problem needs to be unpacked.	1. Different types of crime 2. Different kinds of drugs 3. Social issues

Tool	Purpose of tool	How to construct the tool	Other issues the tool could be used for
Ranking matrix cont.		3. Ask participants to construct a matrix out of string. 4. Ask participants to give the matrix headings, using the cards with their selected problems written on them. They then place cards with the same headings, and in the same order down the left-hand side of the matrix. 5. Ask participants to discuss, through comparison, which problems are more important and why. First ask e.g. "can we compare drugs with drugs". We cannot compare two things that are the same, so ask participants to put a line through the box, using a stick or piece of string. 6. Now ask participants to compare two different things, e.g. drugs and HIV and AIDS. Encourage them to discuss the two problems and give reasons for why one is more of a problem than the other is. 7. Once participants have finished discussing the two issues and have agreed that one is more of a problem than the other, ask them to write the worse problem on a piece of card and place it in the matrix. 8. Continue in this way until participants have compared all the different problems.	
Timeline	A way of looking at and recording key things that have happened around an issue, to people, to projects or to communities over time	1. Lay out a long piece of string to represent the timeline. Then agree on a starting year/ date for when participants became aware of the problem/issue, write it on the card and add to the timeline. 2. Then ask participants to identify the event that took place during that year, once agreed the event should be written on a card and placed next to the year/date. 3. Continue through the years/dates and identify the various events that took place. 4. These cards can be moved around as ideas come out. 5. Once participants have agreed, the tool is transferred onto flipchart.	1. Trends over time of teenage pregnancy 2. History of a village or community 3. Responses to HIV and AIDS over time
Tree	To help us to understand problems better and to see the relationship between different	1. Using local materials, begin to construct a tree. 2. The trunk symbolises the issue or problem being discussed. 3. The roots represent e.g. (causes, income, inputs).	1. Causes and effects 2. Income and expenditure 3. Inputs and outputs

Tool	Purpose of tool	How to construct the tool	Other issues the tool could be used for
Tree cont.	parts of a problem	4. The branches represent the e.g. (effects, expenditure, outputs). 5. Fruits may be added to represent possible solutions or actions.	Issues the tree could be used for: crime, HIV and AIDS, drugs, alcohol
Chapati or Venn diagram	To explore the relative importance, influence or power of people, groups or organisations on a person, process or community/family	1. Prepare different cards of different size circles. 2. Place a card with the person, group or organisation that is the focus of discussion on the ground. 3. Make a list of all the people, groups or organisations that have an influence on the person, group or organisation you are discussing. 4. Decide if the people, groups or organisations on the list have a little, medium or strong influence/power over the person, group or organisation under discussion. 5. Choose an appropriate sized circle (small = little influence, medium = medium influence and big = strong influence) and write the people, groups or organisations onto the relevant size circle. 6. The circles are then placed at different distances from each other to show the nature of relations between them, and lines or symbols added accordingly.	1. Look at potential clubs or groups to network or partner with your organisation 2. Relationships between family members, groups or organisations 3. Identify organisations, clubs/ groups in a community who are a threat or ally to your organisation
Fish bone	To look at causes and effects and inputs and outputs around an issue	1. Draw an outline of a fish, with the backbone representing the issue. 2. On cards, look at the causes of the issue and write each cause on a separate card. 3. Place the cards on the bottom fins. 4. On cards, look at the effects of the issue and write each effect on a separate card. 5. Place the cards on the top fins.	1. Group dynamics 2. Attitudes, behaviours, activities and skills of facilitators/trainers/ health workers etc.
River	To think about the flow of our own lives, the course our lives have taken and the things that have happened to us	1. Start by thinking about a river, the shape of a river and the kinds of things one can find in a river (such as fish, rocks, snakes, waterfalls, etc.) These things represent the things in our own life, the things that we have come across. We can also think about the land on either side of the river. For example, sometimes when the land is polluted it can affect the health of the river. The land on either side of the river represents society and the things that shape our life such as the political climate, poverty, wealth, etc.	1. River of learning 2. Group rivers – history of your organisation

Tool	Purpose of tool	How to construct the tool	Other issues the tool could be used for
River cont.		2. On flipchart paper, each participant draws a river that shows their own lives. 3. They then share their stories with each other, being careful to respect each other's stories and appreciate each other's struggles.Since the experience of constructing and sharing our own rivers of life can be an emotional one, it is important to balance feelings of vulnerability with positive feedback. You could use the 'teddy bear' tool after this.	
Teddy bear	An exercise to share positive feedback and encourage identity in the group	1. One person sits in front of the group with his/her back to the rest of the group. 2. Each person in the group then mentions the most important qualities and values that they see in that person, and puts their hand on the person's shoulder. 3. Each person in the group should be encouraged to take the seat in the middle. 4. Continue until everyone has had a turn.	This exercise is usually done after the River exercise or after a member of the group has disclosed an emotionally draining story/news
Mindmap	To get ideas around an issue or problem	1. On flipchart, draw a circle in the middle of the page and put the problem or issue we want to unpack in the middle. 2. Ask participants to share their views or ideas around the issue, and draw lines linking the issue being discussed.	Any issue or problem
Flow diagram	To explore relationships between events – following the process as each event causes another event to occur and so on	1. Draw a circle in the middle of the flipchart paper and place a card or write the central theme. 2. The participants can then start to identify the causes and effects of this problem/ issue/theme. This could be written directly onto the flipchart or on cards. 3. The facilitator then asks participants to consider the effects of each effect or the cause of each cause, the diagram starts to expand. 4. Each time a new card or point is made, the group attempts to make a link with the other ideas mentioned earlier.	Any issue, theme or problem e.g. HIV/AIDS
Mobility map	To gather baseline information about participants' literacy and numeracy skills and needs	1. To do the map you need: paper and coloured kokis. You could draw your maps directly onto paper, but you can also draw the map on the ground using string, leaves, stones, sand and whatever else is around us. You can use the objects to symbolise	To look at access/ distance to services and facilities

Tool	Purpose of tool	How to construct the tool	Other issues the tool could be used for
Mobility map cont.		the different places you read, write and count and the types of reading,writing and counting you do in the different places. 2. Start by drawing a simple picture of yourselves in the centre of the paper. 3. Then think about all the places you typically visit and services you use during a week, for example, cinema, home, hair salon, shop, taxi, clinic etc. Draw pictures or symbols to represent these different places and services around the page, then connect these pictures or symbols to the picture of yourselves by drawing arrows. 4. Next, think about all the literacy and numeracy skills you use at all these different places, for example, counting money for a taxi or at the shops, reading signs in the cinema, reading electricity bills etc. Draw symbols to represent the different kinds of literacy and numeracy skills you need to use in each place or service. 5. Then think about any difficulties you have with literacy and numeracy in any of these places or services. Then you can think about which of these difficulties are the most important for you to solve or improve. 6. You can then consider your aims to achieve in 3 months, 6 months and 1 year, and plot these aims on a **personal goals timeline**.	
Daily activity calendar	To agree meeting times for the circle participants	1. Each participant can draw a calendar of the week, with pictures to show each day of the week, Monday to Sunday down the left hand column. 2. Participants then draw different times of the day across the top of the calendar, using pictures to represent different times. 3. They then put a cross (X) in the calendar to show each time of each day they are not available because of work, family, personal or leisure activity commitments. 4. Once each participant has done this, they can then discuss their personal commitments with the whole circle. Through this discussion, participants can find times and days when they are all available to meet as a circle.	To look at workloads of girls and boys, men and women

EXAMPLES OF TOF PROGRAMME OUTLINES

The following programme outlines provide an example for you to draw from when you design your facilitator training. These outlines have been used for TOF sessions in other South African contexts.

EXAMPLE ONE

REFLECT FACILITATOR TRAINING
Valkenberg Hospital, Cape Town

TRAINING WORKSHOP PROGRAMME OVERVIEW	
DAY ONE **Mon 6th** Lunch: 12:30 – 13:30 Break: 15:00 – 15:30 Dinner: 18:00	• Arrival, registration and coffee/tea (10:00 – 11:00) • Introductory session: Welcome, name game, today's programme, hopes, fears and expectations, workshop objectives, ground rules, practical arrangements, timetable, nature of the training workshop • Shoe game • Background to the *Reflect* approach (handout one) • What is *Reflect*? Origins and evolution, the *Reflect* process (handout two and three) • Evaluation
DAY TWO **Tues 7th**	• Discussion of participants' context for *Reflect* • Presenting our own realities: Describing our communities and identifying their concerns. Mapping exercise to draw out problems • Identifying problems • Clustering of identified problems • Guidelines to looking at problems • Revision of the *Reflect* learning process • Evaluation
DAY THREE **Wed 8th**	• Matrix ranking of problems from the map/stories • A simulated *Reflect* learning process • Simulation exercise continued using participatory tools (tree) • Important concepts in *Reflect* (through drama) • Drama as a *Reflect* tool • Evaluation
DAY FOUR **Thurs 9th**	• Groups *Reflect* simulation exercise – groups choose problems, practical group simulation activity • Adult learning theory • Facilitation skills • Evaluation
DAY FIVE **Fri 10th**	• Power and gender (using another *Reflect* tool) • Discussion and analysis – changing gender relations • Daily calendar • Mid-training evaluation (how far have we come, concerns?)
DAY SIX Sat 11th	• Social/cultural event
DAY SEVEN Sun 12th	• Open subject to change
DAY EIGHT Mon 13th	• Participatory tools using problems identified (pairwise and Venn diagram tool) • Supplementary materials in *Reflect* • Revision of tools and how to use them • Evaluation

DAY NINE **Tues 14h**	• Participatory tools using problems identified (another *Reflect* tool) • Working with *Reflect* units • Peer observations and supporting each other to learn • Developing a facilitator's manual and lesson plans • Evaluation
DAY TEN **Wed 15th**	• Implementing *Reflect*: steps (timeline and planning matrix) • Starting a *Reflect* circle (What to do in the first few meetings) • Evaluation
DAY ELEVEN **Thurs 16th**	• Managing a *Reflect* circle • Monitoring and evaluation and record keeping • Baseline study
DAY TWELVE **Fri 17th** (Programme ends at lunchtime)	• Workshop summary and last questions • The way ahead – future plans • Recognition of attendance & participation • Training workshop evaluation (VENUE FOR TODAY TO BE DECIDED)

EXAMPLE TWO

Reflect FACILITATOR TRAINING
Eikenhof Lifechange Centre, Johannesburg

TRAINING WORKSHOP PROGRAMME OVERVIEW	
DAY ONE **Mon 20th** Lunch: 12:30 – 13:30 Break: 15:00 – 15:30 Dinner: 18:00	• Arrival, registration and coffee/tea (09:30–11:00) • Introductory session: Welcome, name game, today's programme, hopes, fears and expectations, workshop objectives, ground rules, practical arrangements, timetable, nature of the training workshop • Shoe game • Background to the *Reflect* approach (handout one) • What is *Reflect*? Origins and evolution, the *Reflect* process (handout two and three) • Discussion of participants' context for *Reflect* • Presenting our own realities: Describing our communities and identifying their concerns • Mapping or story telling exercise to draw out problems • Evaluation
DAY TWO **Tues 21st**	• Identifying problems – guidelines to looking at problems • Clustering of identified problems • Matrix ranking of problems from the map/stories • Guidelines to looking at problems • Revision of the *Reflect* learning process • A simulated *Reflect* learning process • Groups choose problems, practical group simulation activity • Evaluation
DAY THREE **Wed 22nd**	• Simulation exercise continued using participatory tools (tree) • Important concepts in *Reflect* (through drama) • Drama as a *Reflect* tool • River of life • Evaluation
DAY FOUR **Thurs 23rd**	• Adult learning theory • Facilitation skills • Power and gender (calendar) • Evaluation

Continued/...

Eikenhof Lifechange Centre, Johannesburg – Training Workshop Programme Overview continued

DAY FIVE **Fri 24th**	• Discussion and analysis – changing gender relations • Participatory tools using problems identified (timeline) • HIV/AIDS and identified problems • Mid-training evaluation (how far have we come, concerns?)
DAY SIX Sat 25th	• Visit to Imbali Visual Literacy Project 'Downtown' exhibition, Newtown, Johannesburg
DAY SEVEN Sun 26th	• Participatory tools using problems identified (pairwise and Venn diagram tool) • Evaluation
DAY EIGHT **Mon 27th**	• Supplementary materials in *Reflect* • Revision of tools and how to use them • Working with *Reflect* units • Peer observations and supporting each other to learn • Evaluation
DAY NINE **Tues 28th**	• Field visit to observe *Reflect* in practice and meet practising facilitators – Vukuzenzele *Reflect* Community Organisation, Orange Farm • Feedback and reflections from field visit • Developing a facilitator's manual and lesson plans
DAY TEN **Wed 29th**	• Implementing *Reflect*: steps (timeline and planning matrix) • Starting a *Reflect* circle (what to do in the first few meetings) • Evaluation
DAY ELEVEN **Thurs 30th**	• Managing a *Reflect* circle • Monitoring and evaluation and record keeping • Baseline study
DAY TWELVE **Fri 1st July** (programme ends at lunch time)	• Workshop summary and last questions • The way ahead – future plans • Recognition of attendance & participation • Training workshop evaluation

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