Training of Trainers manual

A trainer may wish to achieve several things with the training. She or he may wish to organise opportunities for the participants to acquire new knowledge, thinking that once participants have new knowledge, they will behave or perform differently. The underlying assumption is that once people acquire new knowledge, their attitudes and values will be affected, and then consequently they will behave differently.
However, acquiring knowledge in a particular field or subject does not automatically affect subsequent behaviour. Rather, our existing attitudes and values function like a filter, admitting only such knowledge that supports our already entrenched views. Other facts, especially those that are "disturbing", are filtered out and are not allowed to influence our behaviour.
If you as a trainer really want your training to become effective, you need to address all three spheres of learning: attitudes and feelings, knowledge, skills and behaviour. The training approach and methods used to generate knowledge must involve the active influencing of attitudes and values, creating the ability and will to act!
As a trainer you know that no two training events are alike.
Each one offers a unique challenge to you. Each event is an opportunity to try something new and to learn from your experience.
This guideline provides an overview of a number of different methods that will help you and your participants learn and develop.

1. Working and learning together!

Most training is carried out with groups of different sizes and backgrounds. But all too often training is conducted using methods that much diminish the involvement of trainees, leaving them to be spectators rather than participants.
In a training environment where a group sits passively listening to lectures or watching a video, the participants are more being exposed to teaching or “getting served the content”, than actually participating in learning.
When successful, participatory methods facilitate individual and group learning and create a synergy-effect, the group’s learning becomes more than the sum of the individual participant’s learning. Research shows that people understand concepts better and retain information (knowledge) longer when they are actively involved in the training and learning process. Many studies also show that this type of training and learning produces higher achievement and more positive relationships among participants. This way of organising training results in higher-level reasoning, more frequent generation of new ideas and solutions, and greater transfer of what is learned from one situation to another.
There are many useful training methods that give the learner an active role in the training and furthermore provide an opportunity for participants and facilitators to learn from each other.
Some of these methods are presented in this guideline.

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Unfortunately, many people, trainers included, believe that training is nothing more than standing in front of a group of people with a stack of transparencies and delivering what amounts to an information dump!
Karen Lawson, 1998

2. Selecting training methods

One ground rule in all training is to involve the learners and to see them as a resource rather than a target, and thus better enabling them to learn. Another universal rule is to vary the diet, that is, to strive for a rhythm between different methods. (See also the section on *Four important elements*). Using only one kind of method for a whole day will most definitely reduce the prospects of learning. Furthermore, all learners are different and they learn in different ways. By using different methods it is more likely that a large proportion of participants will benefit from the training session.
And always remember that training should be fun! Working together with other people, even on problematic issues, is more fruitful if accompanied by a smile and a sense of humour!
When deciding which method to use, there are usually some basic conditions that need to be considered. Four of the more basic are:

- The objectives of the session or module. What is it that you want to achieve with a specific training module or session?
- The time and resources at hand. If time is scarce and there are many issues to cover, then time-consuming methods might have to wait.

- The complexity of the issue. It is not realistic to address a complex development issue, for example how to improve agricultural production during a short discussion only. Such an issue needs to be approached with a combination of methods including for example structured extended fieldwork assignments.
- The size and the level of the group.

There are two training methods, giving a *presentation* and *group work*, that used with care and in combination can make a training more interesting. In giving a presentation, the trainer is in focus. A group work will put the participants in focus. But the trainer can also increase opportunities for action learning by giving the participants assignments to prepare presentations on different subjects. The preparations can be done as a group work assignment, and then different participants can be responsible for different parts of the presentation.

2.1. Lectures and presentations

Traditional lectures are of course an important part of most training, especially in the beginning of a training programme or a module, when there is a need for factual input and basic theory to get started. But in an action learning environment lectures should be limited, and divided into digestible chunks. Avoid lectures that are characterised by one-way, from trainer to participants, transfer of facts and information. In any lecture make sure there is a systematic feedback to ensure that the message delivered is actually understood by the participants.
To make a presentation more learner-friendly the presenter should have in mind the six “petals of the flower” as can be seen in the illustration.

Prepare
- Use different sources of information
- Keep objectives in your mind and stick to main points
- Cut, cut, cut
  Must know, Should know,
  Nice to know

Structure
- Tell what you want to say – tell it – tell what you have said!
- Try to concentrate to 3–4 points
- Show your structure, use indicator

Link
- To participants expectations
- To what is familiar, what they already know
- To previous and coming sessions

Elaborate
- Give practical real life examples
- Provide visual hooks that help people remember
- Make “loops”

Vary
- Ask questions and allow questions
- Vary your voice and speed of talk
- Throw in a joke or story

Let your body talk
- Eye contact – with everyone
- Move!
- Use your hands

Eight tips for top presentations
Effective presentations and lectures can be compared with a stage performance. Many actors and directors give advice on how to make a good presentation based on their own experiences from theatre and movies. Many actors are also involved in training of trainers. Here are ten interesting tips.

Be nervous but don't be afraid. It is important that you are a bit nervous. But remember, your participants are also nervous at the start of the training. Relaxing them will also relax you. Be polite and start on a friendly note.

Opening and final lines. The first and last minutes of a presentation are often what people remember most vividly. Grab the participants' attention as fast and effectively as you can. Do the same with your exit. Try an un-expected "starter", ask a question, or tell a joke (although this might be very difficult if you have participants you don't know). At the end of the presentation, summarise in key points what you have presented.

Be yourself. Learn to love presenting. Identify your strengths, what you are really good at and use them. Present what is lovable about you, communicate the best of your personality. Give of yourself to your participants. Make contact, reach out to them. Presenting is about giving, - not what you are getting out of it!

Be prepared. If you are well prepared, you will feel more secure. Improvising is only effective if you know your way back to the presentation's structure and contents.

Use your body. People like to see you. People like to see a connection between what you say and the way you say it. If you stay glued to one spot, you magnify your anxiety. Your whole body must react, not only your fingertips or hands. Move! Establish eye-to-eye contact with people, and allow a smile now and then.

Pause ….. for effect. Participants remember sentences that they have to wait for. Dramatic pauses create focus and concentration. Use variety in your voice to create anticipation.

Use questions. Questions, rhetorical or not, are excellent ice-breakers. They bring the participants and presenter closer to each other. Through their answers you will learn about your participants.

Anticipation is so much better. If you create anticipation before or at the beginning of your presentation, much of your job is done. Tease your participants with the promise of revealing some very interesting information.
Adapted from trainer and former actor M. Du Bois

2.2. Present content without lecturing

There are many ways to present necessary information besides lecturing. Remember, people learn by doing, not by being told. Let the participants acquire the information by themselves. Here are some useful methods and techniques.

2.2.1. Group inquiry

Put participants in groups of two or three to study information directly in a written handout. They should then discuss the contents of the handout, trying to understand as much as they can, placing question marks and making notes on those things they don't understand. After a period of time, call all the small groups together and begin answering questions the groups have generated. The purpose of this method is to arouse interest and curiosity, and to stimulate questions. And remember, as a trainer you don't have to answer all the questions. You can pass a question from one group to other groups. You will find that in most cases, there are participants who can provide the correct answers.

2.2.2. Information search

Create a worksheet listing a number of questions related to the information you want them to learn.

Provide resource materials such as handouts, books, manuals, legal documents etc. Put people in small groups and ask them to find the answers to the worksheet questions. After the search period, let the groups report to each other, and discuss what they have found.

2.2.3. Guided discussion

Guided discussion or guided learning is also known as the *Socratic method* after the Greek philosopher. Socrates guided his students in the learning process by asking them a series of questions. With this approach, the trainer poses questions that draw on the participants' knowledge and experience and require them to think about concepts and ideas. You can of course also combine this method with the buzz-group method presented below.

2.2.4. Jigsaw groups

Choose learning materials that can be broken into several parts, such as a number of Acts and regulations related to your particular subject or topic. Divide the participants into small groups according to the number of Acts or groups of regulations, and ask each group to master one Act or group of regulations. Have each group study its material, with group members reading, discussing, and deciding how to present the information in a learner-friendly way to others. After a given time period, form cross-groups or so called *jigsaw learning groups* by taking one participant from each study group to become part of a cross-group. Each cross-group then has one person who has studied a particular legal Act or group of regulations. Have each member of the cross-group present his or her particular Act to the other group members. After all presentations have been made, call all groups together and be prepared to answer questions and clarify any particular issues. The jigsaw group method is an example of synergetic learning. The method creates interdependence among group members, who are responsible for combining separate pieces of information to create a single body of knowledge.

Adapted from: Karen Lawson, 1994

2.3. Brainstorming

Brainstorming is a useful and efficient method to provide the training session with a pool of ideas and/or explore attitudes. Brainstorming can be done in buzz-groups or in plenum and requires a high level of involvement from all participants.

In simple terms it can be described as a quick scanning of the room for ideas and suggestions.

The brainstorming starts with a question or statement for participants to react upon. When initiating brainstorming the facilitator or the trainer is advised to define the issue or problem in focus as a simple statement or question.

People may need a couple of minutes to think and write down their personal thoughts first. Then the facilitator asks for a short phrase or word from each participant. Try not to ask participants in a particular order, jump across the room! Do it quickly, leave comments for later! Write down suggestions on flip chart papers without comment or judgement. Keep asking for contributions from all or until you have enough material to work on. The idea is to get as many contributions as possible. Quantity is the issue, never mind the quality. Sometimes strange suggestions can be very constructive and pivotal to later discussions.

The second part of the brainstorming is for the facilitator to thank the participants for their contributions and to repeat points and clarify where uncertain. Read them aloud, still without any assessments of the different contributions.

The third part is to structure the contributions.

What are the patterns that can be highlighted? Any similarities, differences, categories of statements and ideas? Try to bring the different contributions into "families" or groups of statements and ideas.

Finally, summarise the findings and highlight the patterns.

2.4. Buzz groups

Organising a buzz group discussion is one of the most effective ways of getting participation of all participants in training.

Using buzz groups is an efficient and fun way to let people share ideas and experiences on issues or problems.

State the point of discussion, preferably on a flip chart so that all participants can see it during their discussions. Then divide the group of participants into smaller groups of two, three or four people as they are seated. One of the principles behind the "buzz group" is that it can be organised quickly, often as a response to a situation not planned for in advance. Thus division into groups as people are seated, participants discussing with their "neighbours", during a few minutes, to get everyone involved.

Give the time for discussions, normally around four to five minutes, maximum ten minutes. Keep the discussions short, ensuring the issue or topic to be discussed is clear to all groups. Instead of having one long buzz group discussion (more than ten minutes), divide the topic into a set of short assignments.

As a trainer you will find that suddenly everyone is talking and active (hence the "buzzing" as in a bee-hive), when before none had anything to say, or only one person dared to talk. People often feel free to talk in small groups, but have difficulties in addressing big groups. Ask for brief reports from the buzz-groups. Request one point from each group or let two to three groups report, and the others to add things not being listed by the first groups. Remember to let different groups report first hand in different assignments during the training. Don't ask groups in any particular order, jump across the room!

Note the points on flip chart as they are delivered. Make an “accumulated” list of points. Repeat important points and ask for clarifications if needed. If one group presents a point already listed, you can put a mark to that point, indicating what most groups find interesting etc. At the end of the session take time to repeat and comment on the learning points listed.
Highlight the *learning from each other* that has taken place, the similarities and the differences. If there are very disparate points of views, try to reconcile, and if necessary indicate your own opinion. A buzz group exercise is very valuable as a starter of a session, when introducing a new module or subject. It is like a structured brain storming exercise. It gives the trainer a sense of where the participants are in terms of knowledge and experience related to the relevant subject or topic. A buzz group discussion can disclose their feelings, their pre-assumptions, even a group’s biases.

2.5. Group-discussion

Discussion as a method can be described as an extended buzz group. Discussion is of course also a technique that is built into many different methods and also in everyday life. The method involves more participants, more time, and often a more complex issue of discussion than buzz groups. Try to keep groups rather small (around five members) or there is an increased risk of low participation by some members. Keeping the groups small gives everyone the space to make a contribution and encourages quieter people to talk and express their views. Sufficient time allocation should be 30–45 minutes.
When the objective of the learning activity is to compare experiences, changing attitudes, or contrasting different kinds of knowledge, a group discussion can be a useful method. Follow-up and reporting can focus on how discussions went in different groups, what different points of views were expressed, what the issues and points of views were that there was a consensus on and where they differed.

2.6. Role-play

Role-play is a fun and often illustrative method that very well may induce perspiration among participants. Both because there are people who get nervous upon the very idea of acting, but also because it demands hard work. Therefore a supportive environment is crucial and it is important that the facilitator can provide this. If the environment of trust and mutual support is not there, it is better to save the role-play for later. A role-play represents a real-life situation, and it is important that roles are practised in the safety of the learning environment, being what they are, – *roles*. By acting out different roles we get insights into ways of acting and reasoning and we can better understand other people’s behaviour, – and our own behaviour as well. In training, role-play can represent the transitional stage between theory and daily working practice.
People, both observers and “actors”, must be briefed on their tasks and the context before starting. It is important that every participant practices a role as this will radically reduce the threat that role-plays sometimes can represent.

- A role-play can be adapted in several ways, for example:
- The whole group can participate in the play, each participant having their own role;
- The group can be divided into threes, with one participant acting, one observer, one reporter;
- The whole group might observe one pair at the time.

After the role-play, participants must be given time to reflect on the situation, what they felt and observed, and what they have learned. The facilitator should make clear that all feedback must be given in a sympathetic, friendly and positive manner.

2.7. Case study

A case study is a written account of an often real-life situation and how it was handled. Participants could be handled in a better way. Imbedded in this procedure are the learning points presented in the training. Case studies also help participants to apply new learning, first in the response to the case study, and later in similar situations at the workplace. When participants see that the case study comes from real-life situations, the discussions become very interesting and motivating. If the cases are realistic and relevant, participants are more interested and eager to contribute. Cases can be very short or very long, and they can also be used as a platform for a role-play.

Here are some guidelines for writing a case study:

- Write in story form. Create the scenario, and try to be as realistic as possible. Make the story easy to follow. Use short sentences and paragraphs. Use sub headings.
- Create characters and give them fictitious names. Describe the characters’ environment and their emotions.
- Create a realistic dialogue perhaps just a few lines. It makes the story more interesting.
- Provide background and specific details. But avoid details that may distract the participants from the main issues.
- At the end of the story, provide questions and guidelines for participants to follow as they analyse the case. Make the case challenging but not overwhelming. Think of the time you allocate to work with the case. Put the questions or issues in priority order. All groups should be able to attend to the most important issues. Groups that are fast can move on to the lesser important issues.

2.8. Reflection – discussion – decision

A Reflection - discussion - decision session is used to encourage everybody to participate actively, listen carefully and have more thoughtful discussion.

These sessions can help a group make consensus decisions.

State the point, problem or issue to be discussed, solved or decided on the flipchart, or give each participant the issue on paper. Give 3 to 5 minutes for *individual reflection.* Do not allow conversation among participants, even if some finish early, as this disturbs others, and discourages them from continuing.

After reflecting, go around the table asking each participant in turn to give their view, without comment or interruption. Allow each and everyone to finish what they have to say. As facilitator you take notes, but not on the flipchart, and encourage participant to take their own notes.

2.9. Exercise

A structured group work assignment needs preparation in advance by the facilitator or the trainer. First of all the assignment has to be presented in writing, and each group should have at least one assignment document, preferably each participant. A typical assignment takes up to two hours to finish. The reporting time is about ten to 15 minutes, sometimes even more, for each group. The reporting is at the same time a practice in making

presentations in plenum. The number of participants in a group is advisable to be between three and seven.
In all assignment instructions the following should be included:

- The purpose of the assignment
- The detailed instructions of what should be done.
- The group composition, what participant goes into what group. Aim to have the most constructive and balanced composition of members.
- Time allocation for work and reporting.
- How the results should be presented. What equipment and media that can be used.
- Place for the group work and reporting.

The main task of the facilitating trainer is to supervise the groups. The purpose of the supervision is to support, encourage and guide the groups as they strive to complete the tasks. It is important that the facilitator is available for support and feedback during the time of the assignment. The facilitator should visit the groups a couple of times during the assignment, but also to leave plenty of space for participants to work by themselves. The role of the trainer should not be to serve the groups with information, but to encourage the participants to acquire the information on their own initiatives and among themselves.
The trainer/facilitator must act as a guide and create a positive and open atmosphere. This requires flexibility, sensitivity to other viewpoints and an ability to interpret and fulfil the various needs of the group.
Groups will need enough space and time to present their work and achievements.
Reporting can be done in many different ways and combinations.
For example in the form of a flip-chart exhibition, short presentation, a written report, a role-play etc.
After the reports, the facilitator should provide positive feedback, and encourage the efforts made by the group. It is more fruitful to highlight the good examples in a report, rather than looking for mistakes and poor performance.
Pick something good in each report! That doesn’t mean that a facilitator and participants should avoid giving directives and constructive ideas on how to move on and further develop the results of the group work assignments. Show how you build on what participants have produced.
Any evaluation from the trainer should focus on ensuring that the participants understand the new concepts they have acquired, as well as assessing (and praising) individual participants in terms of their contribution to the group as a whole, e.g. their active participation, their ability to co-operate and helping each other, their initiatives.

2.10. Study visits

A study visit is usually a popular feature of training as it gives an opportunity to get out of the static training venue and change environment for a moment. It is often constructive to visit activities and venues of relevance to any of the topics/subjects covered in a training session.
But it is still important to make the study visit structured and concrete and make sure that it is contributing to the achievements of the training objectives.
It is advisable to have a systematic approach to a study visit. That is, to set objectives for the visit, formulate and agree upon questions to be answered, and set rules for reporting back. In this way the participants have an increased opportunity to get the most out of the study visit. One idea is to divide the group into a number of smaller groups and make

separate study visits. Afterwards the different groups report back to each other on what they have learned from the different study visits. This approach demands active participation from each group of participants.

2.11. Fieldwork assignments

Fieldwork assignments are a very important component of any training programme, as they give participants the opportunity to apply learning in the workplace in a systematic and supported manner. Fieldwork assignments should be practical and of importance for development of real work tasks, processes, or the way people work together. An assignment could be to investigate and understand a situation, involving talking to people and gathering data and information in the 'back home' work situation. Or it could include a research component, but aim primarily to achieve a particular objective, solve a problem or implement some innovation.

All assignments should be linked to the aims and objectives of the learning process.

Both individuals and teams can do assignments. Participants can form their own teams, with a mix of competence and gender balance, or the facilitator may suggest different teams. Teams may choose from a list of proposed fieldwork assignments prepared by the facilitator/s or come up with ideas of their own that have relevance to the learning objectives. When agreeing on an assignment, it is important to ensure that the team has the capacity to carry it out, i.e. the assignment is realistic and not over-ambitious in terms of time and other resources.

The fieldwork assignment agreement between a facilitator and participants is a written contract that stresses the seriousness of the task. A copy of the agreement can be given to the participant's manager.

When designing the fieldwork it is useful to develop and structure it according to the following questions, similar to those used in designing a group work assignment:

- What is the purpose of the assignment?
- What is it that the team wants to achieve? What are the aims and objectives of the fieldwork?
- What must be done? What are the tasks and activities to be carried out? Which member of the team will be responsible for what task?
- Where will the assignment be carried out, in what environment?
- Who will the team talk to during the fieldwork to obtain information? The team might already know the names of people with whom they want to interact; otherwise it is advisable to state the background and the number of people and / or groups that they wish to contact.
- When will it be done? A tentative time schedule, showing when different activities take place, is crucial to make the fieldwork assignment realistic and attainable.
- How will the team work? What methods will they use in their practical assignment work? Will there be interviews, documents and report studies, and/or questionnaires? What are the main questions to be asked?

It is also essential to decide on the format and scope of reporting before the work begins, and how the results will be used. At best, field work assignments can contribute an important and well-informed understanding of the reality that should be put forward to officials, politicians and other key people at local, regional and even national level. Constructive recommendations that come out of fieldwork must not end up in a paper pile in a far- away office without anyone bothering to read them!

2.12. Applied research

When conducting fieldwork, the method of applied research is very useful as a working tool to achieve reliable and objective results. Applied research tries to come as close as practically possible to the rules for conducting research in general.
The purpose is to make research as objective, scientific and reliable as possible, and to stand free from personal views and subjective desires. Research methods involve the accessing, organisation and interpretation of information leading to a better understanding of reality.
For people outside the fieldwork to be able to understand how the research has been conducted, it is important to be systematic and open regarding methods. A very important rule is that reality always has priority over views and ideas. Facts and truth are the essential focus. This may seem obvious, but history holds many examples of evidence selectively gathered to prove a particular theory, and truth being forced to surrender to dogma and ideology.
Some of the basic conditions for applied research are:
– Correspondence between the results and the reality investigated
– Sampling should be representative
– Data and information should be used carefully and in an optimal way
– Reporting of results should be done in a way that allows control, evaluation, criticism, and a thorough examination of the validity of results
– Make the research effort repeatable and cumulative, building on previous knowledge and research and allowing for continued research and increased awareness of reality in the future
– Recognize ethical issues, such as respecting the respondents' personal and/or professional integrity. One other important issue is that of *informed consent*.
This means that the researcher should make the respondents aware of:

- the fact that they are participating in research
- the purpose and procedures of the research
- the risks and benefits of the research
- the voluntary nature of participation
- the procedures to protect confidentiality the right to stop participating in the research at any time.

2.13. Project work

Project work is the most complex and structured type of group methodology. The project is a working tool for change, aimed at achieving a specific and defined result. Every project has a clear start, a period of implementation, and a clear end.
A project is:

- an organised effort to achieve a specific purpose
- limited to a specific time frame
- carried out within a given framework of financial and human resources
- organised by a project leader responsible for results
- implemented by a project group or team with clearly defined responsibilities.

For further information on project work,. Three different participatory tools often used in project work are: the Fishbone diagram, the SWOT analysis, and the Problem-solving process. These tools can also be used in other contexts, such as organisational review and evaluation processes, and on-the-job performance improvement.

3 Solving problems and learning from it

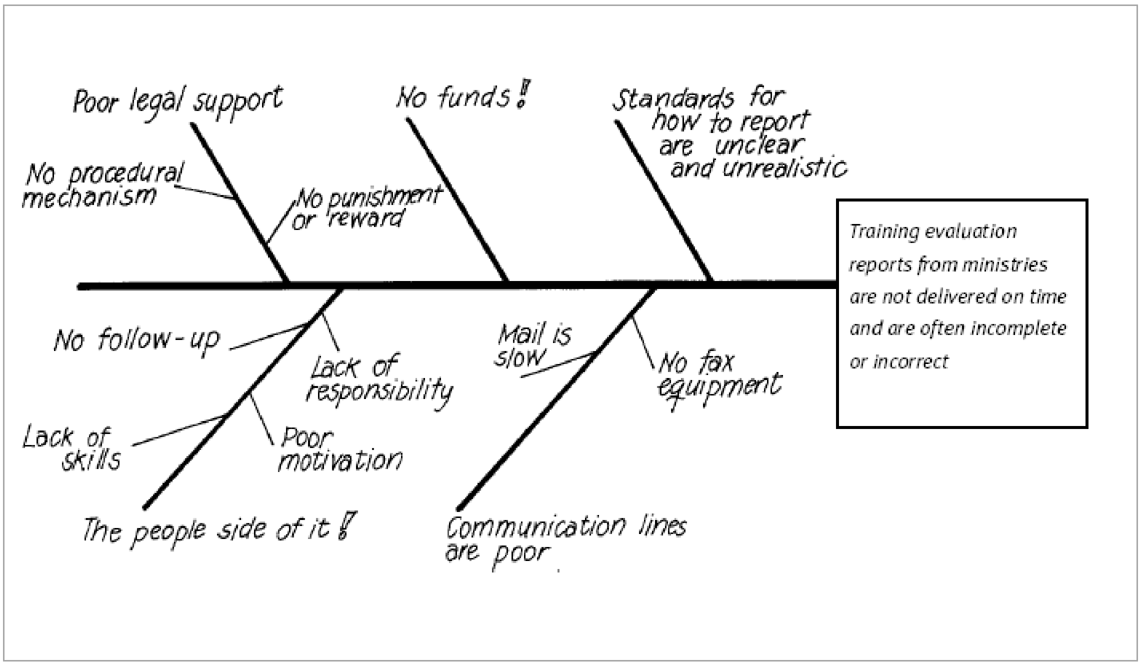
It is often a specific problem or a concern in the day-to-day work that triggers off the idea that training is needed. Many leaders and managers, however, often jump into the

conclusion that training is the way to solve any problem or address any concern. But the problems often need thorough analysis before you with a degree of certainty can say that training is the best remedy, or just one out of several other remedies.
One thing is sure though, and that is that problem solving is a very effective learning process. Solving a problem is not an end in itself, it is actually a stage in a lifelong learning and development process that provides the participants with the capacity to:
– understand and control his or her own learning process;
– develop a problem-solving ability;
– develop self-knowledge and self-confidence;
– develop an ability to co-operate with others;
– place knowledge in a meaningful context;
– broaden his or her understanding of concepts.
By working on problems, participants can be encouraged to learn the facts, grasp the overall implications and see things in perspective.
Analysis of the problem gives the participant an idea of the knowledge and skills required. By working in small groups on the problem requires the participants to give of themselves, share their knowledge. But also to dare reveal their own shortcomings. They learn to listen to each other and develop and test their own arguments. In these ways, problem solving in small groups will encourage the participants' ability for cooperation.
There are different methods and tools for analysing a problem or a concern in an organisation.
A trainer can, as "an outsider", assist the leader and his or her staff in doing a more systematic analysis of the situation and help them arrive at more constructive conclusions. By so doing, the trainer will at the same time get a better understanding of the context of possible training needs and what the training should try to achieve. In a way the three methods or tools presented below therefore can be regarded as needs analysis tools as well.

3.1. The Why-Why method

The Why-Why method is simply to ask a series of "Why"-questions until you have come to the root of a problem or concern. For example:
Why are the participants not on time when the training starts?
Answer: Because they are summoned to the training very late!
Why are they called very late?
Answer: Because the training organisers get the list of nominees very late!
And why do the organisers get the nominees very late?
Answer: Because the personnel directors have no real plan for whom to send and therefore have difficulties in deciding.
Why don't the personnel directors have a plan? Answer: Because the training organisers have failed in helping them create one!
And so on…..

3.2. The Fishbone diagram



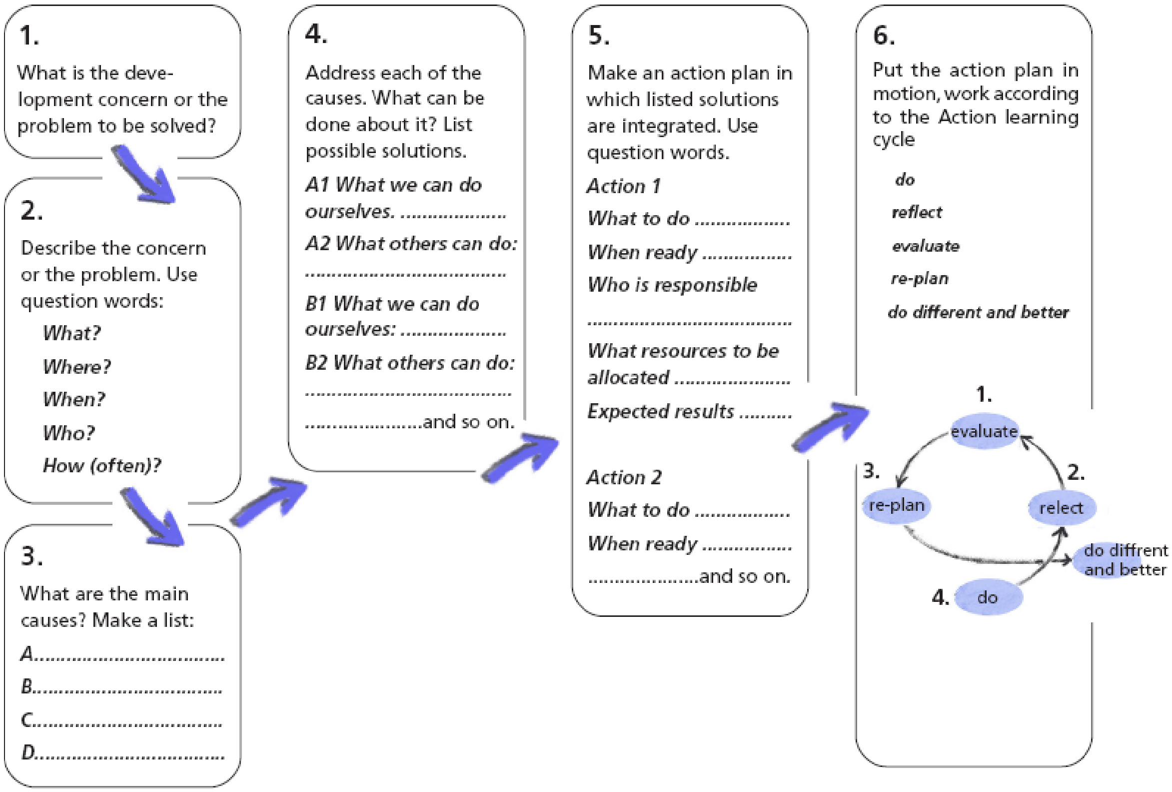
The Fishbone diagram is based on the idea that a problem or a concern normally doesn't have one single cause, but many interrelated. It is necessary to pay attention to a problem as if you are looking through a wide-angle, not a telephoto lens. The fishbone diagram helps you apply more of a systems thinking, bringing in as many perspectives as possible. If you start thinking differently, you see things differently, and then your actions will start to change.

It is often rewarding to try to group possible causes of a problem or what might substantiate a concern. Everything that for example would be linked to technical issues is grouped together, management issues are listed in one group and so on. Through this grouping it is easier to see cause and effect relationships, and at the same time it will become easier to draw the right conclusions.

The fishbone diagram consists of one trunk line and several lines leading in to the trunk, just like a fishbone. Each group of causes has its own line. Experience has shown that a set of five to seven lines is relevant in most cases. The different lines could have headings like: *Management, Environment, People, Methods, Tools and equipment, Materials, Money.*

3.3. Six steps for problem solving

A more systematic approach to problem solving, that also results in more learning, involves **the six steps** shown in the illustration below.



The process starts off with a thorough understanding of the problem or the concern to be addressed. Basic questions that help describe the problem, concern or the situation are:
– *What* is the real issue, the real problem? What will happen if we neglect the problem? Will it disappear? Will it become worse?
– *Where* does it appear in the organisation, in which activity of the process or in interactions between parts of the organisation, with clients or other organisations?
– *When* and how frequently does the problem occur?
– *Who* are the people involved in the problem?
– *How* does the problem manifest itself? In what way does it appear, and what happens?

The next step is to list all possible causes of the problem. Make sure not to blame individuals and groups when identifying possible causes. It is important to remember that when you point a finger at someone, there are at least three fingers pointing back at yourself!
You need to investigate facts on the ground. Interview those affected, people who know about the problem and are likely to be committed to solving it.

In step four you address each of the causes, and make a list of possible solutions. Note that it is not a matter of finding one single solution, but to identify a range of possible ones. By addressing each of the causes, or at least each of the “bones” in the diagram, you will not jump too hastily to premature conclusions. This is actually the point where we should start considering a role model to learn from, although some problems and issues can be handled directly without looking outside. The listing of possible solutions should include things that we can do ourselves, together with things that we would like others to do and what we need inspiration from other to do.

The fifth step is to make a draft action plan, integrating a combination of selected and prioritized possible solutions. There may be an action plan for each of the "bones". Maybe some action plans will become small change projects for organisational improvement that can be taken up more widely.
Action plans should state clear objectives that you want to achieve, and describe the step-by-step actions to be taken. It should have a timetable indicating when different steps are to be ready, who is responsible and what resources are allocated or required. It is also wise, already at the planning stage, to plan how you will follow up and evaluate the implementation of the plan.

The sixth step in the *systematic and learning approach to problem solving* is to put the plan into action.

3.4. SWOT analysis

Another tool for analyzing a situation, team, department or whole organisation, is the SWOT analysis. The acronym stands for: *Strengths and Weaknesses* (internal) *and Opportunities and Threats* (external / in the context or operating environment).
Sometimes *Limitations* are considered together with threats, or if there are no threats. A SWOT analysis is a simple way to characterize any situation, and identify key features that affect the organisation or department or unit, or is likely to affect in the near future. It is a balanced method of analysis, in that it looks at both positive and negative aspects.

The information for a SWOT can be obtained by brainstorming, interviews, surveys and questionnaires, or some combination of these. If something is identified as both *Strength* and a *Weakness*, further analysis is needed to clarify in what respects it is *Strength* and in what respects a *Weakness*.

Some start-up questions are listed in the illustration. Follow-up questions that can stimulate discussion on what to do on the basis of the analysis are:
Strengths - How can we build on these and maximize their benefits?
What other strengths do we need to or want to develop?
Weaknesses - What steps can we take to deal with the weaknesses? How can we turn a weakness into strength?
Opportunities - What opportunities should we take? How can we make use of our strengths to seize key opportunities? What weaknesses prevent us from, or may endanger our success in taking an opportunity?
Threats and Limitations - How can we monitor and avoid them? Can we proactively counter a threat or overcome a limitation by using our strengths?
From the above it is clear that a SWOT analysis is a good basis for strategic thinking, and the method is often used to provide an assessment on which strategic planning is based.

"inside" **S/W** **of the organisation**	*"outside"* **O/T/L** **in the environment**
Strengths • What are we good at ? • What do we do best ? • What are our strong assets ? (e.g. staff, finance, equipment, services, products, partners, information, learning, work processes)	**Opportunities** • What changes do we expect over the next years that will give us opportunities ? • What new openings will arise ?
Weaknesses • What do we do badly ? • Where do we let ourselves down ? • What are our weaknesses in terms of e.g. staff, finance, equipment, services, products, partners, etc. ?	**Threats or Limitations** • What do other organisations have that is better than what we have ? • What do other organisations do better ? • What changes can we expect that will give us problems ?

4. Four important elements

As a trainer you want your participants to learn new things and be able and willing to apply and make use of the new learning in real actions.

You also want them to reflect on what they do and experience, evaluate and draw conclusions from the effects of actions so as to be able to learn from actions and to perform even better.

The approach and methods used in training to generate knowledge must involve elements that actively influence participants' attitudes and values and make them able and willing to act. A training approach that achieves this would include four elements: *theory, experience, relating* and *action*.

Element	Aim	Methods	Key questions
Theory This element provides overview information, facts and background.	Participants should acquire a fundamental understanding of key concepts and terminology.	The more traditional training methods such as presentations, study of literature and other sources, e.g. interviewing people, practitioners etc.	What is .....? What does it stand for?
Experience Here, participants' personal experiences from the field of study are of great importance. Relate what they already know to the new concepts and issues.	To make use of participants pre-knowledge and experiences and their reactions to what they study. To accumulate, either individually or in groups, new experiences and insights relating to the field of study.	Reading, testing and experimenting, role-plays and dramatizations, talking to fellow participants about their experiences, group discussions, Fieldwork Assignments and reporting from these, problem-solving exercises.	How does it work?
Relating The third element concerns individual or group attitudes toward the subject of study.	To promote self-awareness and increase awareness of participants' own, and the group's, attitudes and values. To develop insights into the way participants act and behave, how it affects others, and possible consequences of a change in behaviour. This element should lead participants to adopt a conscious position on the subject studied.	Individual assignments and reflection exercises, group discussion. Most of the methods mentioned under the *Experience* element will also be useful here.	What do I think? What does the group think? What if I would change ..., what can happen then? What do I stand for?
Action The fourth element concerns the relationship between the studied subject, the individual and reality, – and how this relationship is affected by participants' own actions.	To promote the ability and willingness to act.	Individual and group exercises in which participants can practice and establish some degree of mastering a work method or technique, that will make them feel comfortable and ready to implement the new knowledge and skills at the workplace. Combinations of exercises in the training room and Fieldwork Assignments and reporting from such assignments make training very effective.	How can I apply my knowledge, my insights and my experiences in a way that contributes to my organisation's development, and to society at large?